

## Personal Financial Disclosure Statement



To: \_\_\_\_\_

Date: \_\_\_\_\_

### Individual Information

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Occupation: \_\_\_\_\_  
 Phone: \_\_\_\_\_

Current Assets		Current Liabilities	
Cash on Hand or in Banks		Notes Payable (Secured)(Schedule F)	
Other Cash		Notes Payable (Unsecured)(Schedule G)	
Real Estate (other than residence Schedule A)		Real Estate Mortgage Payable (Schedule H)	
Residence		Auto Loans (Schedule I)	
Motor Vehicles (Schedule B)		Unpaid Taxes and Interest	
US Government Securities (Schedule C)		Due to Brokers	
Non-Marketable Securities (Schedule D)		Open Accounts	
Stocks (Schedule E)		Credit Cards (List):	
Other Personal Property			
Life Insurance Cash Value			
Business Interests			
Notes Receivable			
Other Assets:		Other:	
		Total Liabilities	
		<b>TOTAL OF ALL ASSETS</b>	
		<b>LESS TOTAL OF ALL LIABILITIES</b>	
Total Assets		<b>NET WORTH</b>	

### Individual Income Information (Annual)

Salary			
Bonus			
Commissions			
Dividends			
Rental Income			
Other Income (List):			
Total Income			

### Contingent Liabilities

Guarantor, Co-maker			
Lease or Contracts			
Legal Claims			
Other:			



**SCHEDULE "A" REAL ESTATE**

Description of Real Estate	Cost	Market Value	Date Acquired
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
	\$	\$	
<b>Total</b>	\$	\$	

**SCHEDULE "B" MOTOR VEHICLES**

Description of Motor Vehicles	Cost	Value
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
<b>Total</b>	\$	\$

**SCHEDULE "C" U.S. GOVERNMENT SECURITIES**

Description of Stock or Bond	Date Acquired	Par Value	Market Value
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
<b>Total</b>		\$	\$

**SCHEDULE "D" NON MARKETABLE SECURITIES**

Description	Date Acquired	Par Value	Market Value
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
<b>Total</b>		\$	\$

**SCHEDULE "E" STOCKS**

Company	Shares	Date Acquired	Par Value	Market Value
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
<b>Total</b>			\$	\$



**SCHEDULE "F" NOTES PAYABLE SECURED**

Description	Date	Balance	Payment (m/yr)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
<b>Total</b>		<b>\$</b>	<b>\$</b>

**SCHEDULE "G" NOTES PAYABLE UNSECURED**

Description	Date	Balance	Payment (m/yr)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
<b>Total</b>		<b>\$</b>	<b>\$</b>

**SCHEDULE "H" REAL ESTATE MORTGAGES**

Description	Date	Balance	Payment (m/yr)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
<b>Total</b>		<b>\$</b>	<b>\$</b>

**SCHEDULE "I" AUTO LOANS**

Description	Date	Balance	Payment (m/yr)
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
<b>Total</b>		<b>\$</b>	<b>\$</b>

I certify this Statement to be true and correct as of the date indicated:

\_\_\_\_\_  
Signature