

Personal Financial Statement

ALL INFORMATION CURRENT AS OF

PERSONAL INFORMATION

FULL LEGAL NAME

DATE OF BIRTH

SSN / TAX ID

SPOUSE / CO-INDEMNITOR NAME

SPOUSE DOB

SPOUSE SSN / TAX ID

BUSINESS NAME

BUSINESS / MOBILE PHONE

EMAIL ADDRESS

STREET ADDRESS

CITY, STATE, ZIP

GENERAL INFORMATION

Do you have a current will?

Yes

No

Have you ever declared bankruptcy?

Yes

No

ACCOUNTANT NAME

ADDRESS

PHONE

ATTORNEY NAME

ADDRESS

PHONE

STATEMENT OF FINANCIAL CONDITION

Enter whole dollars. Detailed support belongs on Schedules A, B, and C.

ASSETS	AMOUNT	LIABILITIES	AMOUNT
Cash in Primary Bank		Unsecured Debt / Notes Payable	
Cash & CDs in Other Banks		Current Bills Due	
Stocks, Bonds & Securities		Accounts Payable	
Accounts / Notes Receivable		Real Estate Mortgages	
Real Estate Owned		Secured Debt (Non-Real Estate)	
Cash Surrender Value		Taxes Payable	
Business Ventures		Other Liabilities	
Personal Property			
Autos, RVs & Boats			
Other Assets			
Total Assets		Total Liabilities	

TOTAL NET WORTH

Schedules A, B & C

Supporting detail for cash, investments, and real estate

SCHEDULE A - BANK ACCOUNTS

Name of Bank	Location	Account Type	Amount on Deposit

SCHEDULE B - STOCKS, BONDS & INVESTMENTS

Name of Security	No. Shares	Par Value	Market Value	Dividends Paid (Past 2 Years)	If Pledged, To Whom / Purpose

SCHEDULE C - REAL ESTATE

Property Address / Description	Title Holder	Monthly Rent	Present Market Value	Mortgage Balance

Disclosures, References & Certification

Final disclosures and signature block

CONTINGENT LIABILITIES & SPECIAL CIRCUMSTANCES

Disclose items that could affect surety credit or indemnity capacity.

Category	Amount	If Yes, Please Explain
Contingent Liabilities		
Pending Lawsuits		
Contested Income Tax Liens		
Other Special Circumstances		

REFERENCES

Include at least one bank reference and any major trade or financial references.

Reference Name	Relationship	Phone	Address

CERTIFICATION

For the purpose of inducing a surety, broker, producer, or other financial institution to extend credit, bonding capacity, or related accommodations, the undersigned certifies that this statement and the attached schedules are true, complete, and accurate to the best of their knowledge as of the date stated. The undersigned agrees to promptly notify the recipient of any material adverse change in financial condition and authorizes reasonable verification of banking, borrowing, and reference information supplied herein.

SIGNATURES

INDIVIDUAL / PRINCIPAL SIGNATURE

DATE

SPOUSE / CO-INDEMNITOR SIGNATURE

BUSINESS ENTITY (IF APPLICABLE)

AUTHORIZED SIGNATURE

TITLE

WITNESS

NOTARY PUBLIC

COMMISSION EXPIRES