



AMERICAN SURETY BONDS

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## Personal Financial Statement

Name: \_\_\_\_\_

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

Home Address: \_\_\_\_\_

Business Name: \_\_\_\_\_

ASSETS		LIABILITIES	
Cash on Hand & in Banks.....	\$ _____	Accounts Payable.....	\$ _____
Savings Accounts.....	\$ _____	Notes Payable to Banks and Others....	\$ _____
IRA or Other Retirement Account(s)...	\$ _____	<i>(Describe in Section 2)</i>	
Accounts & Notes Receivable .....	\$ _____	Installment Account (Auto).....	\$ _____
Life Insurance-Cash Surrender Value.	\$ _____	Installment Account (Other).....	\$ _____
<i>(Complete Section 8)</i>		Loan on Life Insurance.....	\$ _____
Stocks and Bonds.....	\$ _____	Mortgages on Real Estate.....	\$ _____
<i>(Describe in Section 3)</i>		<i>(Describe in Section 4)</i>	
Real Estate.....	\$ _____	Unpaid Taxes.....	\$ _____
<i>(Describe in Section 4)</i>		<i>(Describe in Section 6)</i>	
Automobile Present Value.....	\$ _____	Other Liabilities.....	\$ _____
Other Personal Property.....	\$ _____	<i>(Describe in Section 7)</i>	
<i>(Describe in Section 5)</i>		<b>Total Liabilities</b>	<b>\$ _____</b>
Other Assets.....	\$ _____	<b>Net Worth</b>	<b>\$ _____</b>
<i>(Describe in Section 5)</i>		<b>Total</b>	<b>\$ _____</b>
<b>Total</b>	<b>\$ _____</b>		

Section 1 ~ Source of Income		Contingent Liabilities	
Salary	\$ _____	As Endorser or Co-Maker	\$ _____
Net Investment Income	\$ _____	Legal Claims & Judgments	\$ _____
Real Estate Income	\$ _____	Provisions for Federal Income Tax	\$ _____
Other Income (Describe Below)	\$ _____	Other Special Debt	\$ _____
Description of Other Income in Section 1			

Section 2 ~ Notes Payable to Banks and Others (Use attachments if necessary.)					
Name & Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (Monthly, etc.)	How Secured or Endorsed, Type of Collateral

<b>Section 3 ~ Stock and Bonds</b> (Use attachments if necessary.)					
# of Shares	Name of Securities	Cost	Market Value/ Quotation	Date of Quotation	Total Value

<b>Section 4 ~ Real Estate Owned</b> (List each property separately. Use attachments if necessary.)			
	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month			
Status of Mortgage			

<b>Section 5 ~ Other Personal Property and Other Assets</b>	(Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and if delinquent, describe delinquency.)

<b>Section 6 ~ Unpaid Taxes</b>	(Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

<b>Section 7 ~ Other Liabilities</b>	(Describe in detail.)

<b>Section 8 ~ Life Insurance</b>	(Give face amount and cash surrender value of policies – name insurance company and beneficiaries.)

I hereby certify that the above information is accurate and true as of the date stated. I authorize the American Surety Bonds Agency, LLC and/or the Surety to verify the accuracy of the statements made and to determine my creditworthiness. I understand FALSE statements my result in forfeiture of benefits and may be punishable by law.

Signature: \_\_\_\_\_

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

Signature: \_\_\_\_\_

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