

FINANCIAL DATA

\*\*\* CONFIDENTIAL \*\*\*

Applicant's Name \_\_\_\_\_

**ASSETS:**

Cash and Savings \$ \_\_\_\_\_  
[CDs, Checking & Money Market Accts]

Marketable Securities \$ \_\_\_\_\_  
[Stocks, Bonds]

IRA's and Annuities \$ \_\_\_\_\_

Real Estate [home] \$ \_\_\_\_\_

Real Estate [other properties] \$ \_\_\_\_\_

Trust Funds \$ \_\_\_\_\_

Other Assets \$ \_\_\_\_\_

Total Assets \$ \_\_\_\_\_

Net Worth \$ \_\_\_\_\_

**LIABILITIES:**

Mortgages \$ \_\_\_\_\_

Notes Payable \$ \_\_\_\_\_

Loans \$ \_\_\_\_\_  
[Bank, Credit Card, Auto]

Other Liabilities \$ \_\_\_\_\_

Total Liabilities \$ \_\_\_\_\_

**ANNUAL INCOME:**

(Applicant)

(Spouse)

Social Security \$ \_\_\_\_\_

\$ \_\_\_\_\_

Pension \$ \_\_\_\_\_

\$ \_\_\_\_\_

Dividends & Interest \$ \_\_\_\_\_

\$ \_\_\_\_\_

Rental/Mortgage Income \$ \_\_\_\_\_

\$ \_\_\_\_\_

IRA Income \$ \_\_\_\_\_

\$ \_\_\_\_\_

Trust Income \$ \_\_\_\_\_

\$ \_\_\_\_\_

Other Sources of Income \$ \_\_\_\_\_

\$ \_\_\_\_\_

Total Annual Income \$ \_\_\_\_\_

\$ \_\_\_\_\_

Combined Annual Income \$ \_\_\_\_\_

Are any of your assets security for a loan or liabilities? \_\_\_\_\_ Yes \_\_\_\_\_ No

Have you guaranteed/promised any debt owned by another with your assets or income? \_\_\_\_\_ Yes \_\_\_\_\_ No

Have you promised any individual or organization a portion of your assets or income? \_\_\_\_\_ Yes \_\_\_\_\_ No

**Financial Disclosure Acknowledgement**

I hereby declare that all financial statements made herein are true and correct according to my best knowledge and belief. In witness whereof, I have hereunto set my hand to this application on this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_.

Signature of Applicant: \_\_\_\_\_

Signature of Responsible Party: \_\_\_\_\_