



Personal Financial Statement

SECTION 1 – INDIVIDUAL INFORMATION (Type or Print)

Name	
Residence Address	
City, State & Zip	
Position or Occupation	
Business Name	
Business Address	
City, State & Zip	
Home Phone No.	Cell Phone No.

SECTION 2 – STATEMENT OF FINANCIAL CONDITION AS OF:

ASSETS	In Dollars (Omit Cents)	LIABILITIES	In Dollars (Omit Cents)
Cash on Hand and in Banks – see Schedule 1	\$	Notes Payable to Banks – Secured–see Schedule 2	\$
U.S. Gov't. & Marketable Securities – see Schedule 4	\$	Notes Payable to Banks – Unsecured-see Schedule 2	\$
Cash Surrender Value Life Insurance – see Schedule 3	\$	Notes Payable to Relatives	\$
Other Stocks and Bonds – see Schedule 4	\$	Accounts and Notes Payable to Others – see Schedule 2	\$
Real Estate – see Schedule 5	\$	Rents and Interest Due	\$
Automobiles: Number (2)	\$	Taxes Due	\$
Ownership in Company (Net Market Value – est.)	\$	Liens on Real Estate –see Schedule 5	\$
Personal Household Assets	\$	Assorted Credit Card Debts (Total)	\$
Other Assets – Itemize	\$	Other Liabilities – Itemize:	\$
	\$		\$
	\$		\$
	\$	TOTAL LIABILITIES	\$
	\$	NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES AND NET WORTH	\$

SECTION 3 – ANNUAL INCOME

Salary	\$
Bonus and Commissions	\$
Dividends and Interest	\$
Real Estate Income	\$
Other Income (Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation)	\$
	\$
TOTAL ANNUAL INCOME	\$

SECTION 4 - COMPARISON OF MONTHLY INCOME AND EXPENSES

Net Monthly Income (Annualized)	\$
Rent of Home Payment	\$
Food and Utilities	\$
Incidentals	\$
Average Amount Paid on Open Accounts	\$
TOTAL EXPENSES	\$
DIFFERENCE BETWEEN INCOME AND EXPENSES	\$

SCHEDULE 1 – BANKING RELATIONS

Name and Location	Cash Balance	Amount of Loan	Type

SCHEDULE 2 – ACCOUNTS, LOANS, AND NOTES PAYABLES

Name of Debtor	Amount Owing	Age of Debt	Nature of Debt	Type

SCHEDULE 3 – LIFE INSURANCE

Person Insured	Beneficiary	Insurance Company	Type	Face Amount

SCHEDULE 4 – OTHER STOCKS AND BONDS

Face Value of Bonds and Number of Shares	Description of Security	Owned By	Cost	Market Value

SCHEDULE 5 – REAL ESTATE

Location	Square Footage	Description	Mortgage Amt.	Payment	Market Value

Please submit this completed form to Equity360llc Fax : (855)554-0014

The undersigned certifies that the information inserted is true and correct:

Signature _____

S.S. # _____ Date Signed _____, 201 _____