

# PERSONAL FINANCIAL STATEMENT

Applicant Information		
Applicant 1 Name:	SSN:	
Current Address (street):		
Current Address (city, state, zip):		
Phone:	Email:	Date of Birth:
Employer:		Since:
Position/Title:		
Dependents (includes self):	Marital status:	
Co-Applicant 2 Name (if applicable):		SSN:
Current Address (city, state, zip):		
Phone:	Email:	Date of Birth:
Employer:		Since:
Position/Title:		
Reference:		
Name:	Phone:	
Email:	How do you know this person?	

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Annual Income			
Income Source	Applicant 1	Co-Applicant 2	Comments
Applicant Salary			
Commissions			
Dividends			
Interest			
Rentals			
Alimony/Child Support			
Other			
Spouse/Partner Salary			
<b>Total Household Income (\$):</b>			

Schedule 1	Cash: Checking, Savings, Certificates, and Money Market Accounts			
Bank, Financial Institution, or Brokerage Firm Name	Type of Account	Name on Account	Pledged	Account Balance (\$)
<b>Total Cash(\$):</b>				

Schedule 2	Securities Owned: Stocks, Mutual Funds, Bonds						
Number of Shares or Bond Amount	Description	Pledged?	Name(s) Registered Under	Cost (\$)	Present Market Value	L-Listed U-Unlisted	C-Controlled R-Restricted
<b>Total Securities(\$):</b>							

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Schedule 3		Life Insurance			
Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy (\$)	Loans (\$)
<b>Total Life Insurance(\$):</b>					

Schedule 4		Profit Sharing, Pension, and IRA Accounts (Including 401K)			
Name of Institution or Plan	Type of Account	Balance	Drawing Income? Y/N	Monthly Income (if any)	Comments
				per	
				per	
				per	
<b>Total Profit Sharing, Pension, and IRA(\$):</b>					

Schedule 5		Real Estate Owned						
Personal Residence:								
Property Address	Legal Owner	Purchase Year / Price	Market Value	Present Loan Balance	Interest Rate	Loan Maturity Date	Monthly Payment	Lender

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Schedule 5		Real Estate Owned (Continued)							
Investment/Partnerships:									
Property Address	Own-ership %	Legal Owner	Purchase Year / Price	Market Value	Present Loan Balance	Interest Rate	Loan Maturity Date	Monthly Payment	Lender
<b>Total Real Estate Owned(\$):</b>									

Schedule 6		Credit Cards		
Name of Company or Bank	Type of Account	Account Balance (\$)	Monthly Payments <i>(That you are making)</i>	Comments
<b>Total Credit Cards(\$):</b>				

Schedule 7		Other: Auto Loans, Personal Loans, Federal & State Taxes Owed, Outstanding Judgments &/Or Collections				
To Whom Payable	Address	Interest Rate	Collateral or Unsecured	Payments (\$)	Maturity Date	Unpaid Balance
				per		
				per		
				per		
				per		
				per		
<b>Total Other(\$):</b>						

## PERSONAL FINANCIAL STATEMENT

### Personal Financial Statement

Assets <i>(Things of Value)</i>	J-Joint I-Individual	Amount (\$)	Liabilities <i>(Debts)</i>	J-Joint I-Individual	Amount (\$)
Cash <i>(Schedule 1)</i>			Notes Payable-Banks <i>(Schedule 7)</i>		
Securities <i>(Schedule 2)</i>			Notes Payable-Others <i>(Schedule 7)</i>		
Life Insurance <i>(Schedule 3)</i>			Insurance Loans <i>(Schedule 3)</i>		
Homestead <i>(Schedule 5)</i>			Installment Loans and Contracts <i>(Schedule 7)</i>		
Other Real Estate <i>(Schedule 5)</i>			Mortgages on My Home <i>(Schedule 5)</i>		
Profit Sharing, Pension and IRA Accounts <i>(Schedule 4)</i>			Mortgages on Other Real Estate <i>(Schedule 5)</i>		
Personal Property			Taxes <i>(Schedule 7)</i>		
Value of My Companies <i>(List)</i>			Credit Cards <i>(Schedule 6)</i>		
			Other Liabilities <i>(Describe)</i>		
Automobiles <i>(year, make, model, miles)</i>					
Other Assets					
<b>Total Liabilities(\$):</b>					
<b>Total Assets (\$):</b>					
<b>Net Worth(\$):</b> <i>(Total Assets Less Total Liabilities)</i>					

# PERSONAL FINANCIAL STATEMENT

## Monthly / Annual Household Budget Estimate

Monthly Housing Expenses (\$)	
Rent/House Payment	
Heat	
Electricity	
Telephone/Cell	
Water/Trash Pick-up	
Cable TV/Internet etc.	
Repairs/Maintenance	
<b>Monthly Subtotal (\$):</b>	

Monthly Insurance (\$)	
Health/Medical <i>(only if paid directly)</i>	
Disability	
Dental <i>(only if paid directly)</i>	
Vehicle	
Household	
Life	
Other	
<b>Monthly Subtotal (\$):</b>	

Monthly Loans/Credit (\$)	
School	
Personal	
Credit Card	
Automobile	
Other	
<b>Monthly Subtotal (\$):</b>	

Monthly Personal Expenses (\$)	
Food at Home	
Food Away From Home	
Clothing Purchases	
Education-Personal	
Education-Children/Childcare	
Newspapers/Magazines	
Personal Care <i>(e.g. Haircut)</i>	
Medicines	
Doctor/Dentist, Etc.	
Gifts/Contributions/Dues	
Allowance	
Recreation/Social Hobbies	
<b>Monthly Subtotal (\$):</b>	

Monthly Vehicle Transportation (\$)	
Down Payments/Extra Payments	
Gas/Oil	
Tires/Battery/Filters	
Repairs	
<b>Monthly Subtotal (\$):</b>	

Monthly Taxes (\$)	
Federal/State-Income <i>(If self-employed)</i>	
Property <i>(only if not escrowed)</i>	
Other	
<b>Monthly Subtotal (\$):</b>	

Budget Summary	
<b>Subtotals:</b>	
Monthly Housing	
Monthly Personal	
Monthly Vehicle	
Monthly Insurance	
Monthly Loans/Credit	
Monthly Taxes	
<b>Total Expense Per Month (\$):</b>	
<b>Total Expense Per Year (\$):</b> <i>(Expense per month x 12)</i>	

# PERSONAL FINANCIAL STATEMENT

## Signature and Acknowledgment

**By signing below I acknowledge and agree that:**

1. WomenVenture has the right to verify the accuracy of the information provided in this application and relating to this loan request.
2. WomenVenture is authorized to request each owner's and/or other guarantor's credit report.
3. I am authorized to apply for this loan on behalf of the business.
4. All supporting documentation related to this application remains the property of WomenVenture.
5. All information provided will be kept confidential by WomenVenture and will be used only for the purpose of considering this loan request. If WomenVenture provides me with a loan, it is authorized to provide others with information concerning any application and guarantor.
6. I understand I am responsible for any legal fees incurred as a result of collections.
7. I will be responsible for any fees relating to securing my collateral such as title and/or UCC charges.
8. I understand all materials submitted will be maintained in a secure fashion.
9. I will allow ACH (Automatic Clearing House known as Automatic Payment Withdrawal) for monthly loan payments.

**The foregoing statement, submitted for the purpose of obtaining credit, contains information that is true and complete to my knowledge and belief; and there are no undisclosed financial or legal liabilities, either current or pending, involving any of the parties to this agreement. It fairly shows my/our financial condition at the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition occurring before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve credit in connection with which it is submitted. You are authorized to check my/our credit and employment history or any other information contained herein.**

**THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.**

**Signature of applicant (1):**

**Date:**

**Printed Name:**

**Title:**

**Signature of applicant (2):**

**Date:**

**Printed Name:**

**Title:**

### EQUAL CREDIT OPPORTUNITY ACT

The Federal Equal Opportunity Act prohibits creditors from discriminating against applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided that the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The Federal agency that administrates compliance with this law concerning this creditor is the Federal Trade Commission, Equal Credit Opportunity, Room 500, 633 Indiana Avenue, N.W., Washington, DC 2058