



ANDERSON & CATANIA
Surety Services, LLC

PERSONAL FINANCIAL STATEMENT

As of _____, _____

Complete this form for: (1) each proprietor, or (2) each limited partner who owns 10% or more interest and each general partner, or (3) each stockholder owing 10% or more of voting stock, or (4) any person or entity providing a guaranty on the loan

Name: _____ Business Phone: _____

Residence Address: _____ Residence Phone: _____

City, State & Zip Code: _____

Business Name of Applicant/Borrower: _____

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

SECTION 1. SOURCE OF INCOME

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Salary	\$ _____	As Endorser or Co-Maker	\$ _____
Net Investment Income	\$ _____	Legal Claims & Judgments	\$ _____
Real Estate Income	\$ _____	Provision for Federal Income Tax	\$ _____
Other Income (Describe Below)*	\$ _____	Other Special Debt	\$ _____

Description of Other Income in Section 1.

*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income

SECTION 2. NOTES PAYBLE TO BANKS AND OTHERS. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral

SECTION 3. STOCK AND BONDS. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed)

Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

SECTION 4. REAL ESTATE OWNED. (List each parcel separately. Use attachment if necessary. Each attachment must be identified as part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

SECTION 5. OTHER PEROSNAL PROPERTY AND OTHER ASSETS. (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)

SECTION 6. UNPAID TAXES. (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

SECTION 7. OTHER LIABILITIES (Describe in Detail)

SECTION 8. LIFE INSURANCE HELD (Give face amount and cash surrender value of policies – name of insurance company and beneficiaries)

I authorize the Surety/Lender to make inquires as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of their obtaining a loan or guaranteeing a loan.

Signature	Date:	Social Security Number:
Signature	Date:	Social Security Number: