

Personal Financial Statement

Blank Template — Summary

Statement As Of: _____

☐ Individual ☐ Joint

Applicant Information					
Full Legal Name	SSN	Date Of Birth	Dependents	Home / Cell Phone	Email Address
Residence Address	City / State / ZIP		Own Or Rent	Residency Length	
Employer / Company	Position / Title		Employment Length	Business Type	

Co-Applicant / Guarantor Information (If Applicable)					
Full Legal Name	SSN	Date Of Birth	Dependents	Home / Cell Phone	Email Address
Residence Address	City / State / ZIP		Own Or Rent	Residency Length	
Employer / Company	Position / Title		Employment Length	Business Type	

Income Summary			
Income Source	Annual Amount	Income Source	Annual Amount
Salary / Business Income		Alimony / Child Support / Maintenance	
Bonus / Commissions		Cash Distributions From Business	
Interest / Dividends		Pension / Retirement Income	
Real Estate / Rental Income		Other Income	
		Total Income	

Balance Sheet Summary (Assets & Liabilities)				
Assets	Amount	Liabilities	Mo. Payment	Amount Owed
Cash & Bank Accounts		Revolving Credit / Lines Of Credit		
Stocks, Bonds & ETFs		Installment Loans		
Retirement Accounts		Real Estate Mortgages		
Accounts / Notes Receivable		Other Liabilities		
Digital Assets				
Real Estate				
Cash Value Life Insurance				
Vehicles				
Business Equity				
Other Assets				
Total Assets		Total Liabilities		
		Net Worth		

Assets

Schedules & Attachments

Cash And Bank Accounts			
Type Of Account	Owner / Entity Name	Financial Institution	Current Balance
		Total Cash & Bank Accounts	

Stocks, Bonds, ETFs & Retirement Accounts			
Asset Type	Owner / Entity Name	Institution / Broker	Current Value
		Total Stocks, Bonds, ETFs & Retirement Accounts	

Digital Assets				
Asset	Owner / Entity Name	Quantity	Price	Current Value
			Total Digital Assets	

Other Assets			
Asset Type / Description	Owner / Entity Name	Current Value	Notes
	Total Other Asset Details		

Debt Schedule

Schedules & Attachments

Revolving Credit / Lines Of Credit						
To Whom Payable	Description / Type	Credit Limit	Rate	Maturity	Payment	Balance
	Total Revolving Credit					

Installment Loans						
To Whom Payable	Description / Type	Rate	Maturity	Payment	Balance	
	Total Installment Loans					

Other Liabilities						
To Whom Payable	Description / Type	Rate	Maturity	Payment	Balance	
	Total Other Liabilities					

Real Estate Mortgage Debt						
Lender	Collateral Property	Obligated Party	Rate	Maturity	Payment	Balance
	Total Mortgage Debt					

Real Estate Schedule

Schedules & Attachments

Real Estate Summary				
Property Count	Purchase Price	Estimated Market Value	First Mortgage Balance	Current Mortgage Balance
Equity	Monthly Mortgage Payment	Annual Debt Service	Net Operating Income	Annual Cash Flow

Real Estate Details			
Field	Property 1	Property 2	Property 3
Property Type			
Lease Type			
Address			
Owner / Entity Name			
Ownership %			
Date Purchased			
Purchase Price			
Estimated Market Value			
First Mortgage Balance			
Current Mortgage Balance			
Equity			
Lender			
Interest Rate			
Note Date			
Maturity Date			
Monthly Mortgage Payment			
Taxes / Insurance Included			
Annual Property Tax			
Annual Property Insurance			
Annual Debt Service			
Net Operating Income			
Annual Cash Flow			

Declarations & Disclosures

Declarations & Certification

Contingent Liabilities		
Item	Details	Amount

Insurance		
Item	Details	Amount

Declarations			
Any pending claims or lawsuits?	☐ Yes ☐ No	Any bankruptcy, foreclosure, judgment, repossession, or debt compromise?	☐ Yes ☐ No
Any taxes past due, audited, or contested?	☐ Yes ☐ No	Prior-year tax returns not filed?	☐ Yes ☐ No
Any tax lien or IRS payment arrangement?	☐ Yes ☐ No	Any guaranty, indemnity, or contingent liability?	☐ Yes ☐ No
Obligated to pay alimony, child support, or maintenance?	☐ Yes ☐ No	Any loan requests currently pending elsewhere?	☐ Yes ☐ No
Any assets held in a trust or family limited partnership?	☐ Yes ☐ No	Beneficiary of any trust or estate?	☐ Yes ☐ No
Applying for sole and separate credit?	☐ Yes ☐ No	Have you obtained credit under any other name?	☐ Yes ☐ No
Ever been convicted of a felony?	☐ Yes ☐ No		

Certification

We certify that the information provided in this Personal Financial Statement is true and complete to the best of our knowledge.

Certifying Applicant(s)

Statement Type

Statement As Of

Signature — Applicant

Date

Signature — Co-Applicant

Date

This blank form follows the standard personal financial statement structure lenders recognize — the same structure LivePFS keeps filled in and current automatically at livepfs.com. General information, not legal, tax, or financial advice.