



Personal Financial Statement

Applicant	Co-Applicant
Full Name:	Full Name:
Street Address (cannot be a P.O. box):	Street Address (cannot be a P.O. box):
City/State/Zip:	City/State/Zip:
Social Security #:	Social Security #:
Date of Birth:	Date of Birth:
Phone: Residence	Phone: Residence
Phone: Work	Phone: Work
Employer:	Employer:
Address:	Address:
Position/Title:	Position/Title:
Since:	Since:
Marital Status:	Marital Status:
U.S. Citizen:	U.S. Citizen:

Assets		Liabilities	
Cash (Schedule 1)	\$	Short Term Notes Due Financial Insts. (Schedule 7)	\$
Retirement Accounts, IRA (Schedule 1)	\$	Short Term Notes Due to Others (Schedule 7)	\$
Securities (Schedule 2)	\$	Credit Accounts and Bills Due (Schedule 8)	\$
Life Insurance Cash Value (Schedule 3)	\$	Insurance Loans and Contracts (Schedule 7)	\$
Mortgages & Contracts Held by you (Schedule 4)	\$	Mortgages on Home (Schedule 5)	\$
Homestead (Schedule 5)	\$	Mortgages on Other Real Estate (Schedule 5)	\$
Other Real Estate (Schedule 5)	\$	Other Liabilities (Describe)	\$
Profit Sharing & Pension (Schedule 6)	\$		\$
Automobile (Describe)	\$		\$
	\$		\$
Personal Property	\$		\$
Other Assets (Describe)	\$		\$
	\$		\$
Total \$	\$	Total \$	\$
		(Total Assets Less Total Liabilities) Net Worth \$	\$

Annual Income	Applicant	Co-Applicant	Please Answer Each Question (Y/N)	Applicant	Co-Applicant
Salary	\$	\$	Are you a Co-Maker, Endorser or Guarantor of any other person's debt?		
Bonuses/Comissions	\$	\$			
Dividends/Interest	\$	\$	Are you a defendant in any suit or legal action?		
Net Real Estate Income	\$	\$			
Alimony/Child Support	\$	\$	Have you ever gone through bankruptcy or had a judgment against you?		
Other (List)	\$	\$			
Total \$	\$	\$	Have you made a will?		



Schedule 1/ Cash, Savings, Certificates and IRA Accounts

Name of Bank or Financial Institution	Type of Account	Joint	Individual	Account Balance
				\$
				\$
				\$
				\$
				\$
Total \$				\$

Schedule 2/ Securities Owned

Description/Name of Brokerage	Type of Shares	Current Market Value
		\$
		\$
		\$
Total \$		\$

Schedule 3/ Life Insurance

Insurance Company	Insured	Beneficiary	Face Value	Cash Value	Loans
			\$	\$	\$
			\$	\$	\$
Total \$			\$	\$	\$

Schedule 4/ Receivables Due To Me On Mortgages And Contracts I Own

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Repayment Terms	Balance Due
				\$ per	\$
				\$ per	\$
Total \$					\$

Schedule 5/ Real Estate Owned

Property Address	Type*	Current Market Value	Mortgage Balance	Lender and Interest Rate	Year Acquired	Mortgage Payments (per month)	Percent Owned	Gross Rental Income (per month)
		\$	\$			\$	%	\$
		\$	\$			\$	%	\$
		\$	\$			\$	%	\$
		\$	\$			\$	%	\$
		\$	\$			\$	%	\$
Total \$		\$	\$			\$	%	\$

*Enter SFR if single family residence, CRE if commercial real estate, C if condo, and number of units for multi-family.



Schedule 6/ Profit Sharing and Pension

Account Holder	Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
			\$	\$	\$
			\$	\$	\$
			Total \$	\$	\$

Schedule 7/ Installments, Credit Lines and Notes

Name of Creditor	Collateral	Date of Maturity	Repayment Terms	Balance Due
			\$ per	\$
			\$ per	\$
				Total \$

Schedule 8/ Credit Accounts, Bills Due, Alimony/Child Support, Daycare, Etc.

Name of Company	Repayment Terms	Balance Due
	\$ per	\$
	\$ per	\$
		Total \$

You certify that the information provided in this statement is true and correct. Piedmont Capital Funding is authorized to retain this personal financial statement whether or not credit is approved and is further authorized to verify your credit and employment history or any other information in this statement. This application does not obligate Piedmont Capital Funding to make any loan even if you meet the normal standards Piedmont Capital Funding considers in determining whether to approve or deny the application.

Applicant's Signature Date

Co-Applicant's Signature Date