

# INDIVIDUAL FINANCIAL STATEMENT

To: \_\_\_\_\_  
 First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_  
 Home Phone: (\_\_\_\_) \_\_\_\_\_ Business Phone: (\_\_\_\_) \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Social Security No. \_\_\_\_-\_\_\_\_-\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ No. of Dependents: \_\_\_\_ Driver Lic. # \_\_\_\_\_ State: \_\_\_\_  
 Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

CHECK AS APPLICABLE – Type of Account  Individual  Joint

1. Marital Status:  Married  Separated  Unmarried (includes single, divorced, & widowed) Name of Spouse: \_\_\_\_\_
2. Are you relying on alimony, child support, or maintenance payments as a basis for the repayment of the credit requested?  
 Yes  No Name: \_\_\_\_\_
3. Are you relying on income or assets of another person as a basis for repayment of the credit requested?  Yes  No  
 Name: \_\_\_\_\_

## FINANCIAL CONDITION AS OF \_\_\_\_\_, \_\_\_\_\_

ASSETS			LIABILITIES			TOTAL LIABILITY	MO. PYMT. AMOUNT
<b>Cash</b>	Bank:		<b>Notes Payable To Banks</b>	<b>SCHEDULE D</b>			
	Bank:			Payable to This Bank Payable to Other Banks			
<b>Stocks &amp; Bonds</b>	<b>SCHEDULE B</b>		<b>Other Notes &amp; Accounts Payable</b>	<b>SCHEDULE D</b>			
	Listed			Contract Purchases Open & Revolving Accts. Other			
<b>Notes, Contracts &amp; Accounts Receivable</b>	<b>SCHEDULE C</b>		<b>Taxes Payable</b>	Income Taxes			
				R/E Taxes			
<b>Life Ins.</b>	Cash Value		<b>Real Estate, Notes &amp; Contracts Payable</b>	<b>SCHEDULE D</b>			
<b>Real Estate</b>	<b>SCHEDULE A</b>			Residences			
	Residence(s)			Unimproved Land			
	Unimproved Land			Income Property			
	Income Property		Other				
<b>Other Personal Property</b>	<b>SCHEDULE E</b>		<b>Other Liabilities</b>	<b>SCHEDULE D</b>			
	Autos & Trucks			Life Ins. Loans			
	Furniture & Fixtures						
<b>Other Assets</b>	<b>SCHEDULE E</b>		<b>(+) TOTAL ASSETS</b>				
			<b>(-) TOTAL LIABILITIES</b>				
<b>TOTAL ASSETS</b>			<b>(=) NET WORTH</b>				

### RE-CAP OF INCOME AND EXPENSES

ANNUAL INCOME FOR YEAR		ANNUAL EXPENSES FOR YEAR		CONTINGENT LIABILITIES	
Salary or Wages		Property Tax & Assessments		As Endorser on Notes/Contracts	
Dividends or Interest		Fed. & State Income Tax		As Guarantor on Notes/Contracts	
Rentals (Gross Income)		Real Estate Loan Payments		For Taxes	
Business (Net Income)		Payments on Contracts/Notes		Other (Describe)	
Other Income (Describe)*		Estimated Living Expenses			
		Other:			
<b>TOTAL INCOME</b>	\$	<b>TOTAL EXPENSES</b>	\$	<b>TOTAL</b>	\$

\*Alimony, child support or maintenance payment income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.

### LIFE INSURANCE

FACE AMOUNT	BENEFICIARY	COMPANY

I (we) hereby affirm that the foregoing information contained in this financial statement is presented for the purpose of prequalification for leasing. I understand Landlord is relying on this statement of my financial condition. Landlord and/or WestMar Commercial Brokerage, Inc. (WestMar), as agent and at the request of Landlord, is authorized to make any investigation of my credit or employment status either directly or through any agency selected by Landlord or WestMar. WestMar makes no representation or warranty to Landlord as to applicant's financial status.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

With each schedule list below indicate co-ownership, if any, and the extent of it.

**SCHEDULE A LIST OF REAL ESTATE AND IMPROVEMENTS (Show Mortgage Information in Schedule D).**

Type and Location of Property	Date Acquired	Title in Name of	Holder of Lien	% You Owe	Annual Taxes	Monthly Rent	Original Cost	Present Market Value

**SCHEDULE B STOCKS AND BONDS**

Number of Shares	Description – Rate – Maturity If Pledged, to Whom	How Registered	Market Value	Book Value If No Market

**SCHEDULE C NOTES, CONTRACTS AND ACCOUNTS RECEIVABLE**

Due From (Name)	Date of Obligation	Balance		Payment Terms	Due Date	Description of Collateral If Any
		Original	Present			

**SCHEDULE D NOTES, CONTRACTS AND ACCOUNTS PAYABLE (Include Mortgages on Property Listed in Schedule A)**

Due From (Name)	Date of Obligation	Balance		Payment Terms	Due Date	Description of Collateral If Any
		Original	Present			

**SCHEDULE E DETAILS OF OTHER IMPORTANT ASSETS**

Items	Estimate Current Value	Items	Estimated Current Value	Items	Estimated Current Value