



**PERSONAL
FINANCIAL
STATEMENT**
LOANS UP TO \$50K

Use this form if you are requesting a loan up to \$50,000. Please answer as clearly as you can. Estimates are okay. If you do not know an answer, write your best estimate or note that you need help.

Borrower name

Borrower date of birth

Phone / email

Address

Business name

Entity: Sole Proprietorship General Partnership LLC Corporation (C Corp or S Corp) Nonprofit

MONTHLY INCOME (Include business income, wages, household/spouse income, other)

MONTHLY EXPENSES (Such as housing, utilities, food, transportation, insurance, debt payments, other)

CASH AND SAVINGS (Include cash on hand, bank accounts, retirement/savings)

MAJOR DEBTS (Credit cards, auto loans, student loans, other – balance + monthly payment)

VEHICLES OWNED (Include year, make/model, estimated value, loan balance, monthly payment)

REAL ESTATE OWNERSHIP (Include primary home / rental / land – est. value, mortgage balance, monthly payment, rental income)

Borrower Certification

- I certify that the information provided is true and complete to the best of my knowledge.
- I understand that First Southwest Community Fund may request supporting documents.

Borrower Name

Signature

Date