



PERSONAL FINANCIAL STATEMENT

LOANS \$50K-\$250K

Use this form if you are requesting a loan from \$50,000-\$250,000. 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 _____ Ownership % (if applicable) _____

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

ASSETS

Checking accounts \$ _____

Savings accounts \$ _____

Certificates of Deposit \$ _____

Securities (Stocks, bonds, mutual funds) \$ _____

Notes receivable \$ _____

Personal property \$ _____

Real estate \$ _____

Life insurance \$ _____

Retirement accounts \$ _____

Vehicles \$ _____

Business ownership value \$ _____

TOTAL ASSETS:
\$

LIABILITIES

Credit card debt \$ _____

Student loans \$ _____

Vehicle loans \$ _____

Real property mortgages \$ _____

Notes payable / promissory notes \$ _____

Mortgage / rent \$ _____

Other liabilities \$ _____

TOTAL LIABILITIES:
\$

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VEHICLES AND EQUIPMENT (Include make and model)

Used for business?

1	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5	<input type="checkbox"/> Yes	<input type="checkbox"/> No

REAL ESTATE

Type	Address	Estimated Value	Mortgage Balance	Monthly Payment	Rental Income

INCOME SOURCES - ANNUAL (Include business income, wages, rental income, other)

TOTAL ASSETS: \$	-	TOTAL LIABILITIES: \$	=	NET WORTH \$
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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