



Personal Financial Statement

Complete the form for each partner who owns 20% or more interest in the business. If more than one owner, each should complete separate personal financial statements. Only one Personal Financial Statement is required if owners are married. Please report HOUSEHOLD income, including the income of your Spouse/ Domestic Partner if applicable.

Applicant Name _____ **Statement of Conditions as of (date):** _____

Section 1: Background Information

Please report your income (and your Spouse/ Domestic Partner's income if applicable) OUTSIDE of your earnings from your business. If you have additional streams of revenue, please report that income in this section. If you own multiple businesses, please report the income from those businesses in Section 4.

	Applicant	Applicant's Spouse (if applicable)
Employer #1		
Occupation Title		
No. of years Employed		
No. of Hours per week		
Salary or hourly Wage	\$	\$
Additional Notes		
Employer #2		
Occupation Title		
No. of years Employed		
No. of Hours per week		
Salary or Hourly Wage	\$	\$
Additional Notes		

Section 2: Summary of Income and Expenses

Income		Expenses	
Applicant's Monthly Income	\$	Applicant's monthly HOUSEHOLD Expenses (include Spouse's expenses)	\$
Applicant Spouse's Monthly Income	\$	Applicant's Monthly Debt Payment (include Spouse's debt payment)	\$
Additional Monthly Income (Investment, Real Estate, etc)	\$	Additional Monthly Expenses	\$
TOTAL:	\$	TOTAL:	\$



Section 3: Assets and Liabilities

Please complete this section including both the applicant's assets and liabilities, as well as the applicant's Spouse/ Domestic Partner, if applicable.

Assets		Liabilities	
Cash on Hand & In Banks (list accounts)		Credit Cards (list accounts and balances)	
	\$		\$
	\$		\$
	\$		\$
IRA or Retirement Accounts (list accounts)			\$
	\$	Installment Loans	
	\$	Mortgage #1	\$
Real Assets		Mortgage #2	\$
Real Estate	\$	Auto Loan #1	\$
Automobile (current value)	\$	Auto Loan #2	\$
Other Real Assets	\$	Student Loan #1	\$
Other Assets		Student Loan #2	\$
Life Insurance	\$	Unpaid Taxes	\$
Accounts Receivable (loan owed to you)	\$	Co-Signed Loan (you are the co-signer)	\$
Loan to Friends/ Family	\$	Co-Signed Loan	\$
Loan to Friends/ Family	\$	Installment Account (other)	\$
Alimony/ Child Support	\$	Other Liabilities	
Other Assets	\$	Other Liabilities	\$
TOTAL ASSETS:	\$	TOTAL LIABILITIES	\$



Section 4: Corporations, Partnerships, and LLCs

Please include information about income from the business you are applying for AVANZA for, and any other business ownership obtained by you and your Spouse/ Domestic Partner (if applicable).

Business Name	Ownership % (household)	Monthly Personal Earnings

If you do not pay yourself regularly from your business, please include a brief summary explaining how, or if, you pay yourself from your business(es).

Section 5: Additional Comments

Please use the space below to share about any other personal financial information that was not covered in the sections above.
