

# TRANSWORLD BUSINESS BROKERS, LLC

## Personal Financial Statement

Applicant's Name		Social Security Number:			
Street Address		City	State	Zip	
Co-Applicant's Name		Social Security Number			
Street Address		City	State	Zip	
This statement may be completed jointly but both married and unmarried co-applicants if their assets and liabilities are sufficiently joined so that the statement can be meaningfully and fairly presented on a combined basis, otherwise separate statements are required. If the Co-applicants section was completed by a spouse, this statement must be completed by the spouse also.					
<input type="checkbox"/> Completed Jointly <input type="checkbox"/> Not Completed Jointly – Information provided is for <input type="checkbox"/> Applicant <input type="checkbox"/> Co-Applicant					
Assets	Itemize	In Even Dollars	Liabilities	Itemize	In Even Dollars
Cash on Hand and in Bank (s)		\$	List Accounts Payable to Bank, Finance Companies and Others		\$
Marketable Securities: Stocks, Bonds, Etc.		\$			\$
		\$			\$
		\$			\$
Life Insurance/ Cash Value		\$			\$
		\$			\$
Real Estate Owned		\$		\$	
Partial Interest in Real Estate Equity		\$	Contingent Liabilities		\$
Automobiles		\$	Auto Loans - Total		\$
		\$			\$
		\$	Real Estate Mortgages		\$
		\$			\$
Other Personal Property (Total)		\$	Total Liabilities		\$
		\$	<b>Total Assets</b>		\$
Other Assets		\$	(Subtract) <b>Total Liabilities</b>		\$
<b>TOTAL ASSETS</b>		\$	<b>Total New Worth</b>		\$

Sources of Income	Personal Information		
Salary	\$	Business/Occupation	
Bonus & Commissions	\$	Age	
Dividends & Interest	\$	Partner or Office in any other venture	
Real Estate Income	\$		
	\$	Children	
Total	\$	Other Dependents	
Contingent Liabilities		General Information	
An endorser, Co-maker, or Guarantor	\$	Are any assets pledged? (See schedule)	<input type="checkbox"/> Yes <input type="checkbox"/> No
On Leases or Contracts	\$	Are you a defendant in any suits or legal actions?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Legal Claims	\$		
	\$	Personal Bank Accounts carried at	
Other Special Debt	\$	Have you ever taken bankruptcy? Explain	<input type="checkbox"/> Yes <input type="checkbox"/> No
No. of Share or Face Value (Bonds)	Description	In Name of	Market Value
			\$

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	\$
	\$
	\$

**Schedule of Real Estate Owned**

Description of Property and Improvements	Date Acquired	Title in Name of	Cost	Market Value	Mortgage	
					Amount	Maturity

**Other Investments and Securities**

No. of Shares or Face Amount	Description	In Name of	Market Value
			\$
			\$
			\$

**Schedule of Assets Pledged**

Description	Value	To Whom Pledged

**Give Names of Banks or Finance Companies where Credit has been Obtained**

Name	Date	High Credit	Basis

I/We acknowledge that I/We have made this application with the intent that you should rely on the information contained herein in granting the credit requested. I/We understand that you may share information about this transaction, and (if approved), about this loan with the "Specific" Financial Institution and its affiliates and assigns for various purposes, including, unless I/We notify you to the contrary, to offer me/us various financial products, and services from time to time. If the request is granted, you may report information concerning the credit to consumer reporting agencies and to others. I/We affirm that my/our answers are complete and true and authorize you to verify or obtain any information concerning them. Upon your request, I/We further authorize any firm or individual from whom I/We may have obtained credit or requested credit, to furnish you with the details of that transaction. I/We also agree to provide current information upon request, in a form acceptable to you.

\_\_\_\_\_  
**APPLICANT'S SIGNATURE**

\_\_\_\_\_  
**CO-APPLICANT'S SIGNATURE**

\_\_\_\_\_  
**E-MAIL ADDRESS (optional)**

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**E-MAIL ADDRESS (optional)**

\_\_\_\_\_  
**DATE**