

Personal Financial Statement

INFORMATION FOR EACH OWNER OR GUARANTOR

As of _____

NOTICE - Arizona is a "Community Property" state, which generally means that all property, goods, salaries and debts acquired, earned or contracted after marriage belong, by law, to the marital community. "Sole and Separate Property" is generally defined as those goods, property, income and debts acquired prior to marriage or by gift or inheritance after marriage.

PLEASE SELECT ONE OF THE FOLLOWING STATEMENTS:

- ☐ This financial statement is submitted individually as sole and separate debt of the undersigned and does not contain information on assets, income, or creditworthiness of spouse or marital community if individual resides in a community property state.
- ☐ This financial statement is submitted jointly with another person listed below as other party. (Initials) _____ (Initials) _____
- ☐ This financial statement is submitted individually but undersigned is relying on income from alimony, child support, or separate maintenance or on the income or assets of another person listed below as other party as a basis for repayment of the credit requested.

PERSONAL INFORMATION									
INDIVIDUAL					OTHER PARTY (if applicable)				
Name:					Name:				
Physical Home Address:					Physical Home Address:				
City/State/Zip:					City/State/Zip:				
Mailing Address:					Mailing Address:				
Social Security #	Date of Birth	City of Birth	Mother's Maiden Name		Social Security #	Date of Birth	City of Birth	Mother's Maiden Name	
Phone	Cell <input type="checkbox"/> Home <input type="checkbox"/>	Email Address			Phone	Cell <input type="checkbox"/> Home <input type="checkbox"/>	Email Address		
Employer:					Employer:				
Address:					Address:				
City/State/Zip:					City/State/Zip:				
Business Phone	Title/Position		Years on Job		Business Phone	Title/Position		Years on Job	

PERSONAL ASSETS	AMOUNT (\$)	PERSONAL LIABILITIES	AMOUNT (\$)
Cash		Accounts Payable	
Money Market Funds		Accrued Taxes	
Cash Value of Life Insurance (Schedule A)		Credit Cards (Schedule D)	
Accounts and Notes Receivable		Installment Loans (Schedule E)	
Readily Marketable Securities (Schedule B)		Real Estate Loans (Schedule C)	
Non-Readily Marketable Securities (Schedule B)		Business Loans (Schedule E)	
Vested Retirement Accounts (Schedule B)		Other Loans and Liabilities (List):	
Personal Residence (Schedule C)			
Other Real Estate (Schedule C)			
Related Business Interests (Schedule F)			
Vehicles			
Personal Property			
Other Assets (List):			
TOTAL ASSETS		TOTAL LIABILITIES	
		NET WORTH	

Personal Financial Statement Cont'd

SCHEDULE A - PERSONAL INSURANCE POLICIES

INSURANCE COMPANY	POLICY OWNER	BENEFICIARY	CASH VALUE	FACE VALUE	LOAN BALANCE

SCHEDULE B - PERSONAL SECURITIES AND RETIREMENT ACCOUNTS

SHARES	DESCRIPTION	OWNERSHIP	MARKET VALUE	PLEGDED	
READILY MARKETABLE SECURITIES				YES	NO
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
NON-READILY MARKETABLE SECURITIES					
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
VESTED RETIREMENT ACCOUNTS (IRA, 401-K, Keogh)					
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>

SCHEDULE C - PERSONAL RESIDENCE AND OTHER REAL ESTATE (Including Loans)

PERSONAL RESIDENCE	PURCHASE		MARKET VALUE	LOAN BALANCE	MONTHLY PAYMENT	LENDER
	YEAR	PRICE				
OTHER REAL ESTATE	PURCHASE		MARKET VALUE	LOAN BALANCE	MONTHLY PAYMENT	LENDER
	YEAR	PRICE				

SCHEDULE D - PERSONAL CREDIT CARD DEBT

CREDIT CARD COMPANY	BALANCE	PAYMENT	CREDIT CARD COMPANY	BALANCE	PAYMENT

SCHEDULE E - PERSONAL INSTALLMENT DEBT (Non Real Estate)

INSTALLMENT LOAN LENDER	BALANCE	PAYMENT	INSTALLMENT LOAN LENDER	BALANCE	PAYMENT

SCHEDULE F - RELATED BUSINESS INTERESTS (Partnerships, Corporations, LLC's)

NAME/LOCATION OF BUSINESS	TYPE OF ENTITY	YEAR ORGANIZED	MARKET VALUE	PERCENT OWNED	NET VALUE
				%	
				%	
				%	

NOTE: Market value of business interests should be net of any related debts. Net value should be your ownership percentage of the market value. For interests which represent a material portion of your total assets, please include the relevant financial statements or tax returns including Schedule K-1s.

Personal Financial Statement Cont'd

CONTINGENT LIABILITIES		AMOUNT (\$)
Are you a guarantor, co-maker, or endorser for any debt of an individual, corporation, or partnership?	YES <input type="checkbox"/> NO <input type="checkbox"/>	
Do you have any outstanding letters of credit or surety bonds?	YES <input type="checkbox"/> NO <input type="checkbox"/>	
Are there any suits or legal actions pending against you?	YES <input type="checkbox"/> NO <input type="checkbox"/>	
Do you have any past or present judgments against you?	YES <input type="checkbox"/> NO <input type="checkbox"/>	
Are you contingently liable on any lease or contract?	YES <input type="checkbox"/> NO <input type="checkbox"/>	
Are any of your tax obligations past due?	YES <input type="checkbox"/> NO <input type="checkbox"/>	
If yes for any of the above, give details on separate attachment and include with this financial statement		

OTHER	
Have you or any firm in which you are a major owner ever declared bankruptcy?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are any assets held in a trust?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you have a retirement plan in place?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you have a line of credit or unused credit facility at any other institution(s)?	YES <input type="checkbox"/> NO <input type="checkbox"/>

REPRESENTATIONS AND WARRANTIES

The information contained in this statement is provided to induce Growth Partners Arizona (lender) to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledge and understand that lender is relying on the information provided in deciding to grant or continue credit or to accept a guarantee thereof. Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete, and that the information in any attachments hereto or in other financial statements, financial exhibits, tax returns, or other financial documents of any kind provided to lender in connection herewith ("financial information") including, but not limited to, financial information for a business entity or entities, is true, correct, accurate, and complete. Each of the undersigned agrees to notify lender in writing of any change in name, address, or employment and of any material change (1) in the undersigned's capacity to perform its (or their) obligations to lender or (2) in the financial condition of any of the undersigned or (3) in the financial condition of any business entity or entities whose financial information has been provided to lender in connection herewith. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. Lender is authorized to make all inquiries it deems necessary to verify the accuracy of the information contained herein and to determine the creditworthiness of the undersigned. The undersigned authorize any person or consumer reporting agency to give lender any information it may have on the undersigned. Each of the undersigned authorizes lender to answer questions about its credit experience with the undersigned. As long as any obligation or guarantee of the undersigned to lender is outstanding, the undersigned shall supply annually an updated financial statement and any related income tax returns to lender. This personal financial statement and any other financial or other information that the undersigned provides to lender shall be property of the lender.

Signature (Individual) Date

Signature (Other Party) Date