

MCDEVCO Personal Finance Statement



Circle Type of Entity: LLC LLP C-Corp S-Corp Partnership Sole Proprietor

Date: _____ Percent of Ownership: _____

Everyone that owns 20% or more in the company will have to complete a Personal Finance Statement annually for the term of the loan

Applicant			Co-Applicant		
Full Name			Full Name		
Street Address			Street Address		
City/State/Zip			City/State/Zip		
County			County		
Since	Owned	Rented	Since	Owned	Rented
Social Security Number		Date of Birth	Social Security Number		Date of Birth
Phone: Residence		Work	Phone: Residence		Work
Employer			Employer		
Address			Address		
Position/Title		Since	Position/Title		Since
Previous Employer			Previous Employer		
Position/Title		How Long	Position/Title		How Long
Dependents (Include self)			Dependents (Include Self)		
Marital Status			Marital Status		

*Annual Income	Applicant	Co-Applicant	Please Answer Each Question (Yes /No)	App.	Co-App
Salary			Are you a Co-Maker, Endorsers, or Guarantor of any other person's debt?		
Bonuses/Commissions			Are you a defendant in any suit or legal action?		
Dividends/Interest			Have you ever gone through bankruptcy or had a judgement against you?		
Net Real Estate Income					
Other (List)			Have you made a will?		
Total					

*Please contact your banker if you need assistance with completing these schedules. Round all amounts to the nearest \$100.00

** Income from all alimony, child support, or maintenance payments need not be entered unless you want it considered as a base for repayment

Please Fill Out Completely

Assets		Liabilities	
Cash (Schedule 1)		Short Term Notes Due Financial Insts. (Schedule 7)	
Security (Schedule 2)		Short Term Notes Due to Others (Schedule 7)	
Life Insurance Cash Value (Schedule 3)		Credit Accounts and Bills Due (Schedule 8)	
Mortgage and Contracts Held by You (Schedule 4)		Insurance Loans (Schedule 3)	
Homestead (Schedule 5)		Installment Loans and Contracts (Schedule 7)	
Other Real Estate (Schedule 6)		Mortgages on Home (Schedule 5)	
Retirement Accounts, including IRA Accts (Schedule 1)		Mortgages on Other Real Estate (Schedule 5)	
Automobile (Described)		Taxes	
Personal Property		Other Liabilities (Describe)	
Other Assets (Describe)			
Profit Sharing & Pension (Schedule 6)			Total \$
Total \$		(Total Assets Less Total Liabilities)	Net Worth \$

Schedule 1 / Cash, Savings, Certificates and IRA Accounts

Name of Bank or Financial Institution	Type of Account	Account Balance
Total \$		

Schedule 2 / Securities Owned

Par Value or No. of Shares	Description	Registered in Name(s) of	Listed or Unlisted	Current Market Value
Total \$				

Schedule 3 / Life Insurance

Insurance company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans
Total \$					

Schedule 4 / Receivables Due to Me on Mortgages and Contracts I Own

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Payment Term (Month)	Balance Due with Date
Total \$					

Schedule 5 / Real Estate Owned

Property Description	Name of Creditor	Year Acquired	Purchase Price	Date of Maturity	Payment Term (Monthly)	Current Market Value
Total \$						

Insurance Co: _____

Agent: _____

Schedule 6 / Profit Sharing and Pension

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
Total \$				

