

PERSONAL FINANCIAL STATEMENT

As Of 5/10/2007

Name		Residence Phone	
Residence Address		City	State Zip
Assets		Liabilities	
Cash on hand and in Bank		Accounts Payable	\$ _____
Savings Accounts		Notes payable (to bank &	
IRA		others) Describe in Sec 2)	\$ _____
Accounts and Notes Rec	\$ _____	Installment Account (Auto)	
		Mo. Payments \$ _____	
Life Insurance-Cash	\$ _____	Installment Account (Other)	
Surrender Value Only		Mo. Payments \$ _____	\$ _____
(Describe in Sec 1)		Loans on Life Insurance	\$ _____
Real Estate		Mortgages on Real Estate	
(Describe in Sec 4)		(Describe in Sec 4)	\$ _____
Automobile-Present Value)		Unpaid Taxes	
Other Personal Property		(Describe in Sec 6)	\$ _____
(Describe in Sec 5)		Other Liabilities	
Other Assets		(Describe in Sec 7)	
(Describe in Sec 5)			
		Total Liabilities	
Total Assets.....	\$ _____	NET WORTH:.....	
Annual Salary		Legal Claims and Judgments	\$ _____
Annual Spousal Salary		Provision for Fed Income Tax	\$ _____
Real Estate Income	\$ _____	Other Special Debt	\$ _____
Section 1. Life Insurance held (Give face amount & cash surrender value of policies- Name of Insurance company & beneficiaries)			
Union Labor Life Insurance			
2 Policies Term-			
1 Accidental death-			
All double upon accidental death			

Section 2.

Address/type of property	Title	Date Purchased	Original Cost	Present Value	Mortgage Balance

Section 3 Stocks and Bonds (use attachments if necessary Each attachment must be identified as a part of this statement and signed.)

Number of Shares	Name of Shareholder	Cost	Market Value Quotation Exchange	Date of Quotation Exchange	Total Value
Varied					
Varied					

Section 4. Real Estate Owned (List each parcel separately. Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Type of Property	Property A	Property B	Property C
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payments per Month/Year			
Status of Mortgage			

Section 5. Other Personal Property and Other Assets (Describe, and if any pledged as security, state name and address of lienholder, amount of lien, terms or payments, and if delinquent, describe delinquency.)

New Appliances, Furnishings, Electronics, Personal Items, Etc.

Section 6. (Describe in detail, as to whom payable, when due, and to what property, if any a tax lien attaches)

Credit Cards

Section 7. Other Liabilities (Describe in Detail.)

Credit Cards

Signature: _____ Date: _____ Social Security Number: _____

Signature: _____ Date: _____ Social Security Number: _____