

PERSONAL FINANCIAL STATEMENT as of _____, 20_____

Name: _____

ASSETS

Cash Deposited (See Schedule 1)	\$ _____
Amounts Receivable from Others (See Schedule 2)	_____
Stocks & Bonds (See Schedule 3)	_____
Cash Surrender Value of Life Insurance (See Schedule 4)	_____
Value of Homestead (See Schedule 5)	_____
Value of Other Real Estate (See Schedule 6)	_____
Value of Automobiles (See Schedule 7)	_____
Value of All Other Assets (See Schedule 8)	_____
TOTAL ASSETS	\$ _____

LIABILITIES

Notes Owed to Banks (See Schedule 9)	\$ _____
Notes Owed to All Others (See Schedule 10)	_____
Balance Owed on Homestead (See Schedule 5)	_____
Balance Owed on Other Real Estate (See Schedule 6)	_____
Balance Owed to All Others (See Schedule 4)	_____
Taxes Owed (See Schedule 11)	_____
TOTAL LIABILITIES	\$ _____
NET WORTH (Total Assets Less Total Liabilities)	\$ _____
TOTAL LIABILITIES & NET WORTH	\$ _____

YES NO

- | | | |
|--------------------------|--------------------------|----------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Are any of the assets listed above held in a name other than yours? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Are any of the assets listed above held as separate property by either spouse? |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Do any of the assets listed above, other than real estate, secure debts? |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Are you obligated to pay the debt(s) of any other party? |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Are you the party of any suit or do you have any unsatisfied judgments against you? |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Have you ever declared bankruptcy or made an assignment to creditors? |

If any of the foregoing questions are answered yes, attach an explanation of the facts.

I/We are liable for contingent liabilities: Yes ___ No ___ (If so, attach a separate explanation and schedule.)

I/We do ___ do not ___ have a last will and testament.

Name of Executor of Last Will and Testament: _____

My/our home address is:

Street	City/State	Zip Code	Phone: _____
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We hereby certify that all information provided in this financial statement and all attached schedules and explanations is true and correct as of the above stated date. I/We hereby attest that Texas Contractors Surety & Casualty Agency can rely on this information as a complete disclosure of my/our assets and liabilities. You have my/our permission to verify any information presented herein and you may disclosure this statement and related information to a surety company of lender as you deem appropriate.

 Signature
 Social Security No.: _____

 Signature
 Social Security No.: _____

Note: Please attach separate page if additional space is needed.

SCHEDULE 1 - Cash Deposited in Banks

Name of Bank: _____ Account No.: _____ Amount of Deposit: \$ _____
Name of Bank: _____ Account No.: _____ Amount of Deposit: \$ _____
Total: \$ _____

SCHEDULE 2 - Amounts Receivable from Others

Debtor: _____ How Paid: _____ Balance Due: \$ _____
Debtor: _____ How Paid: _____ Balance Due: \$ _____
Total: \$ _____

SCHEDULE 3 - Stocks and Bonds

No. of Shares: _____ Co. Name: _____ Current Value: \$ _____
No. of Shares: _____ Co. Name: _____ Current Value: \$ _____
No. of Shares: _____ Co. Name: _____ Current Value: \$ _____
Total: \$ _____

SCHEDULE 4 - Life Insurance

Company: _____ Insurance Amt.: \$ _____ Cash Value: \$ _____ Loan Amt.: \$ _____
Company: _____ Insurance Amt.: \$ _____ Cash Value: \$ _____ Loan Amt.: \$ _____
Company: _____ Insurance Amt.: \$ _____ Cash Value: \$ _____ Loan Amt.: \$ _____
Totals: \$ _____ \$ _____ \$ _____

SCHEDULE 5 - Value of Homestead

Year Purchased: _____ Cost: \$ _____ Current Value: \$ _____ Loan Balance: \$ _____

SCHEDULE 6 - Value of Other Real Estate

Year Purchased: _____ Cost: \$ _____ Current Value: \$ _____ Loan Balance: \$ _____
Year Purchased: _____ Cost: \$ _____ Current Value: \$ _____ Loan Balance: \$ _____
Year Purchased: _____ Cost: \$ _____ Current Value: \$ _____ Loan Balance: \$ _____
Totals: \$ _____ \$ _____ \$ _____

SCHEDULE 7 - Value of Automobiles

Make/Model: _____ Cost: \$ _____ Current Value: \$ _____
Make/Model: _____ Cost: \$ _____ Current Value: \$ _____
Make/Model: _____ Cost: \$ _____ Current Value: \$ _____
Total: \$ _____

SCHEDULE 8 - Value of All Other Assets

Description: Personal Property Estimated Cost: \$ _____ Current Value: \$ _____
Description: Personal Property Estimated Cost: \$ _____ Current Value: \$ _____
Description: Personal Property Estimated Cost: \$ _____ Current Value: \$ _____
Total: \$ _____

SCHEDULE 9 - Notes Owed to Banks

Bank Name: _____ Secured By: _____ Balance Owed: \$ _____
Bank Name: _____ Secured By: _____ Balance Owed: \$ _____
Total: \$ _____

SCHEDULE 10 - Amounts Owed to Others

Lender Name: _____ Secured By: _____ Balance Owed \$ _____
Lender Name: _____ Secured By: _____ Balance Owed \$ _____
Lender Name: _____ Secured By: _____ Balance Owed \$ _____
Total \$ _____

SCHEDULE 11 - Taxes Owed

Type Tax Owed: _____ Due Date: _____ Amount Owed: \$ _____
Type Tax Owed: _____ Due Date: _____ Amount Owed: \$ _____
Total: \$ _____

Initials: _____