

Porama Srijinda, MBA, REALTOR®, CIPS

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Personal Financial Statement

BORROWER:	SOCIAL SECURITY NUMBER:
MAILING ADDRESS:	PHONE NUMBER:
CO-BORROWER:	SOCIAL SECURITY NUMBER:
MAILING ADDRESS:	PHONE NUMBER:
PROPERTY ADDRESS:	IS PROPERTY VACANT? Y ___ N ___

EMPLOYMENT			
BORROWER		CO-BORROWER	
Employer's Address & Phone #:	How Long?	Employer's Address & Phone #:	How Long?
MONTHLY INCOME – CO-BORROWER		MONTHLY INCOME – CO-BORROWER	
Gross Wages/Frequency of Pay	\$	Gross Wages/Frequency of Pay	\$
Unemployment Income	\$	Unemployment Income	\$
Child Support/Alimony	\$	Child Support/Alimony	\$
Disability Income/SSI	\$	Disability Income/SSI	\$
Rents Received	\$	Rents Received	\$
Other	\$	Other	\$
Commissions, bonus and self-employed income	\$	Commissions, bonus and self-employed income	\$
TOTAL (NET INCOME)	\$	TOTAL (NET INCOME)	\$
MONTHLY EXPENSES		ASSETS	
Other Mortgages/Liens	\$	Type	Estimated Value
Auto Loans	\$	Checking Account(s)	\$
Auto Expenses/Insurance	\$	Savings/Money Market	\$
Credit Cards/Installment Loans (total minimum payment for both per month)	\$	Stocks/Bonds/CDs	\$
Health Insurance (not withheld from pay)	\$	IRA/Keogh Accounts	\$
Medical (co-pays and Bills)	\$	401k/ESPO Accounts	\$
Child Care/Support/Alimony	\$	Home	\$
Food/Spending Money	\$	Other Real Estate	\$
Water/Sewer/Utilities/Phone	\$	Cars	\$
HOA/Condo Fees/Property Maintenance	\$	Life Insurance (Whole Life not Term)	\$
Life Insurance Payments (not withheld from pay)	\$	Other	\$
TOTAL	\$	TOTAL	\$

Borrower Signature: _____ Date: _____

Co-Borrower Signature: _____ Date: _____