



TRUITT

INSURANCE & BONDING, INC.
Surety Programs Business Coverages
Home & Auto Life Products

www.truittinsurance.com

Personal Financial Statement dated: _____

Individual #1:			Individual #2:		
Name:	_____	Name:	_____		
Address:	_____	Address:	_____		
City:	_____	State:	_____	Zip:	_____
SSN:	_____	Birthday:	_____	SSN:	_____
Home Phone:	_____	Work Phone:	_____	Home Phone:	_____
Cell Phone:	_____	DL # & State:	_____	Cell Phone:	_____
Employer:	_____	Email:	_____	Employer:	_____

NOTE: If this personal financial statement includes a second individual who is borrowing or guaranteeing debt with ServisFirst, the columns titled Solely Owned #2 and Solely Liable #2 should be completed.

For the post references in each row [e.g. (1), (2), (3)], please itemize each subject on the corresponding attached schedules.

Assets	Solely Owned		Jointly Owned	Total
	Individual #1	Individual #2		
Cash, Money Market, CD's (1)				\$0
Government & Marketable Securities (2)				\$0
Closely-Held Securities (3)				\$0
Accounts or Notes Receivable				\$0
Cash Value of Life Insurance (4)				\$0
Personal Residence (5)				\$0
Other Real Estate (5)				\$0
Personal Property				\$0
IRA's, 401K's, Keoughs, Etc.				\$0
Other Assets				\$0
Totals:	\$0	\$0	\$0	\$0

Liabilities	Solely Liable		Jointly Liable	Total
	Individual #1	Individual #2		
Notes Payable to Banks - Secured (6)				\$0
Notes Payable to Banks - Unsecured (6)				\$0
Other Notes Payable - Secured (6)				\$0
Other Notes Payable - Unsecured (6)				\$0
Accounts Payable & Credit Cards				\$0
Real Estate Mortgages (5)				\$0
Tax Liability				\$0
Loans on Life Insurance (4)				\$0
Margin Accounts				\$0
Other Liabilities				\$0
Totals:	\$0	\$0	\$0	\$0

Net Worth	Individual #1	Individual #2	Combined Net Worth	Total
Total Net Worth				\$0

Contingent Liabilities	Individual #1	Individual #2	Jointly Liable	Total
As Guarantor or as Endorser (7)				\$0
Other Contingent Debt (7)				\$0
Totals:	\$0	\$0	\$0	\$0

*Above Contingent Liabilities section must be completed. If no contingent debt is involved, please write or type **NONE** in the above section.

For the Year:

For the Year:

Sources of Income	Individual #1	Individual #2	Monthly Spending	Individual #1	Individual #2
Wages & Salaries			Mortgage/Rent - Residence		
Commissions, Bonuses, Etc.			Other Mortgages		
Interest & Dividends			Automobile		
Net Rental Income			Credit Cards		
Distributions, Partnership Draws			Alimony		
Other			Other		
Total Income:	\$0	\$0	Total Expenditures:	\$0	\$0

Schedule (1) - Cash				
Name & Location of Institution	Account Number & Type	Balance	Owned By	Pledged?

Schedule (2) - Marketable Securities					
Face Value	Owned By	Description	Cost	Current Market Value	Amount Pledged

Schedule (3) - Closely Held Securities					
Face Value	% of Total Shares	Owned By	Description	Current Market Value	Amount Pledged

Schedule (4) - Life Insurance							
Insurance Company	Owned By	Beneficiary	Face Value	Cash Value	Policy Loans	Amount Pledged	

Schedule (5) - Real Estate (If only a percentage is owned, input the total property value including your share)								
Description & Location	Owned By	%	Date Acquired	Cost	Value	Mortgage Balance	Monthly Payment	Net Yearly Cash Flow

Schedule (6) - Notes Payable (Excluding debt on property listed in schedule #5)						
Name & Address of Note Holder	Obligor	Type of Loan	Current Balance	Monthly Payment	Collateral	

Schedule (7) - Other Contingent Debt Description (List type of contingent debt and \$ amount)			
Borrower	\$ Amount		Additional Comments:

of Dependents: _____ Ages of Dependents: _____

Have you ever drawn a will? _____ Executor: _____

Are you a defendant in any legal suits or legal actions? _____
If yes, describe: _____

Are you a principal shareholder, director, or executive officer of a bank? _____
If so, list Bank name: _____

Have you ever filed for bankruptcy? _____ If yes, describe: _____

I/We provide this personal financial statement as an accurate and true representation of my/our current financial condition. I authorize lender to confirm this fact by periodically obtaining credit reports on me/us. I agree to immediately notify lender of any change in my/our financial condition.

If joint statement,

Signature: _____

Date: _____

Signature: _____

Date: _____