



Personal Financial Statement

Please download, complete the form in its entirety and email to ebonds@bch-insurance.com. Or, fax to 713.688.7967.

Name		Phone	
Address			
Business or Occupation		Partner or officer in any other venture?	
Are any assets pledged?	Have you ever made a composition settlement or filed bankruptcy?		
	Please explain:		

Assets

Liabilities and Net Worth

Cash on Hand & in Banks (Schedule 1)	\$	Notes Payable to Banks - Secured (Schedule 1)	\$
U.S. Government Securities	\$	Unsecured (Schedule 1)	\$
Accounts, Loans & Notes Receivable (Schedule 2)	\$	Notes Payable to Relatives	\$
Cash Surrender Value Life Insurance (Schedule 3)	\$	Accounts & Notes Payable to Others	\$
Other Stocks & Bonds (Schedule 4)	\$	Rents & Interest Due	\$
Real Estate (Schedule 5)	\$	Taxes Due (Schedule 5)	\$
Automobiles - Number ()	\$	Liens on Real Estate (Schedule 5)	\$
Other Assets (Itemize)	\$	Other Liabilities (Itemize)	\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$	TOTAL LIABILITIES	\$
	\$	NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES AND NET WORTH	\$

Income

Contingent Liabilities

Salary	\$	Notes Payable to Banks - Secured (Schedule 1)	\$
Bonus & Commissions	\$	Unsecured (Schedule 1)	\$
Dividends & Interest	\$	Notes Payable to Relatives	\$
Real Estate Income	\$	Provisions for Federal Income Tax	\$
		Other Special Debt	\$
TOTAL INCOME	\$		

Insurance Coverage Comparison of Monthly Income and Expense

Fire Insurance - Buildings	\$	Net Monthly Income	\$
Household Effects & Autos	\$	Rent or Home Payment	\$
Liability Insurance - Automobiles	\$	Food & Utilities	\$
Personal	\$	Incidentals	\$
General Public	\$	Avg. Amt. Paid on Open Accts.	\$
Other Insurance	\$	TOTAL EXPENSES	\$
		DIFFERENCE BETWEEN INCOME & EXPENSES	\$

Schedules

No. 1 Banking Relations (List of all my bank savings and loan accounts.)

Name of Location	Cash Balance	Amount of Loan	Maturity of Loan	How Endorsed, Guaranteed or Secured
	\$	\$		
	\$	\$		
	\$	\$		
	\$	\$		

No. 2 Accounts, Loans and Notes Receivable (List of the largest amounts owing to me.)

Name & Address of Debtor	Amount Owing	Age of Debt	Description or Nature of Debt	Description or Nature of Debt	Description or Nature of Debt
	\$				
	\$				
	\$				
	\$				
	\$				
	\$				

No. 3 Life Insurance

Name of Person Insured	Name of Beneficiary	Name of Insurance Co.	Type of Policy	Face Amount of Policy	Total Cash Surrender Value	Total Loans Yearly Policy	Amount of Year Premium	Is Policy Assigned?
				\$	\$		\$	
				\$	\$		\$	
				\$	\$		\$	
				\$	\$		\$	

No. 4 Other Stocks and Bonds

Face Value Bonds No. Stock Shares	Description of Security	Registered in Name of	Cost	Present Market Value	Income Received Last Year	If Pledged, State to Whom
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	
\$			\$	\$	\$	

No. 5 Real Estate

The legal and equitable title to all the real estate listed in this statement is solely in the name of the undersigned, except as follows:

Description or Street No.	Dimensions or Acres	Improvements Consist of	Mortgages or Liens	Dues Dates & Amounts of Payments	Assessed Value	Present Market Value	Unpaid Taxes	
							Year	Amt
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$
					\$	\$		\$

The undersigned certifies that the information inserted on both pages hereof has been carefully read, and is true and correct.

Date _____

Signed _____