



Insurance Services Inc.

**PERSONAL FINANCIAL STATEMENT
NOT TO BE USED FOR BUSINESS STATEMENTS**

1031 Calle Recodo, Suite D
San Clemente, CA 92673
surety@southcoastsurety.com
www.southcoastsurety.com
(949) 361-1692 Fax (949) 361-9926
DOI Lic# 0B57612

To induce Company to become surety for the Undersigned, or to accept the Undersigned as Indemnitor, The Undersigned submits the following Financial Statement

Personal financial statement of _____ SS. # _____
(Name)

(Street Address, City, State, Zip)

(Name of Spouse) Home Phone # () _____ Bus. Phone # () _____

ASSETS		LIABILITIES	
(Do not include Assets of doubtful value)			
	In Dollars (Omit Cents)		In Dollars (Omit Cents)
Cash on hand and in banks		Notes payable to banks - secured	
U.S. Gov't. & Marketable Securities - See Schedule A		Notes payable to banks - unsecured	
Non-Marketable Securities - See Schedule B		Due to brokers	
Securities held by broker in margin accounts		Amounts payable to others - secured	
Restricted or control stocks		Amounts payable to others - secured	
Partial interest in Real Estate Equities - see Schedule C		Accounts and bills due	
Real Estate Owned - see Schedule D		Unpaid income tax	
Loans Receivable		Other unpaid taxes and interest	
Automobiles and other personal property		Real estate mortgages payable -	
Cash value life insurance - see Schedule E		see Schedule D	
Net value of business - if not included above		Other debts - Itemize	
Other assets - Itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIAB. AND NET WORTH	

Do you have any contingent liabilities? If so, describe	Do you have a will? _____ if so, name of executor.
As indorser, co-maker or guarantor? \$	Are you a partner or officer in any other venture? If so, describe.
On leases or contracts? \$	
Other special debt? \$	Are you obligated to pay alimony, child support or separate maintenance payments? If so, describe.
Amount of contested income tax liens? \$	Are any assets pledged other than as described on schedules? If so, describe.
Personal bank accounts carried at:	
	Have you ever been declared bankrupt? If so, describe.

SCHEDULE A - U.S. GOVERNMENTS & MARKETABLE SECURITIES

Number of Shares Or Face Value (Book)	Description	In Name Of	Are These Pledged?	Market Value

SCHEDULE B - NON-MARKETABLE SECURITIES

Number of Shares	Description	In Name Of	Are These Pledged?	Source of Value	Value

SCHEDULE C - PARTIAL INTERESTS IN REAL ESTATE EQUITIES

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

SCHEDULE D - REAL ESTATE OWNED

Address & Type Of Property	Title In Name Of	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

SCHEDULE E - LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE

Name of Insurance Company	Owner Of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

SCHEDULE F - BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED

Name & Address Of Lender	Credit In The Name Of	Secured Or Unsecured	Original Date	High Credit	Current Balance

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or Corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your or your assigns favor. Each undersigned understands that you or your assigns are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You and your assigns are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (Individual) _____

S.S. No. _____ Date of Birth _____

Signature (Other Party) _____

S.S. No. _____ Date of Birth _____

Date Signed _____ 19____