

# Mickey Herman Surety & Insurance Agency

2505 Briarglen Road, Acton, CA 93510 | [www.MickeyHerman.com](http://www.MickeyHerman.com)

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## PERSONAL FINANCIAL STATEMENT as of \_\_\_\_\_

Name						Business Phone					
Residence Address						Residence Phone					
City, State, & Zip Code											
Business Name of Applicant/Borrower											
<b>ASSETS</b>						<b>LIABILITIES</b>					
(Omit Cents)						(Omit Cents)					
Cash on hands & in Banks						Accounts Payable					
Savings Accounts						Notes Payable to Banks and Others (Describe in Section 2)					
IRA or Other Retirement Account						Installment Account (Auto) Monthly Payment \$ _____					
Accounts & Notes Receivable						Installment Account (Other) Monthly Payment \$ _____					
Life Insurance--Cash Value Only (Complete Section 8)						Loans on Life Insurance					
Stocks & Bonds (Describe in Section 3)						Mortgages on Real Estate (Describe in Section 4)					
Real Estate (Describe in Section 4)						Unpaid Taxes (Describe in Section 6)					
Automobile(s)--Present Value						Other Liabilities (Describe in Section 7)					
Other Personal Property (Describe in Section 5)						<b>Total Liabilities</b>					
Other Assets (Describe in Section 5)						<b>Net Worth</b>					
<b>Total</b>						<b>Total</b>					
<b>Section 1. Sources of Income</b>						<b>Contingent Liabilities</b>					
Salary						As Endorser or Co-Maker					
Net Investment Income						Legal Claims & Judgments					
Real Estate Income						Provision for Federal Income Tax					
Other Income (Describe Below)*						Other Special Debt					
Description of Other Income in Section 1.											
* Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.											
<b>Section 2. Notes Payable to Bank and Others</b>						(Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)					
Name & Address of Noteholder(s)				Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral			

Section 3. Stocks and Bonds.					
Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value
Section 4. Real Estate Owned.					
	Property A	Property B	Property C		
Type of Property					
Name & Address of Title Holder					
Date Purchased					
Original Cost					
Present Market Value					
Name & Address of Mortgage Holder					
Mortgage Balance					
Amount of Payment per Month/Year					
Status of Mortgage					
Section 5. Other Personal Property and Other Assets.					
Section 6. Unpaid Taxes.					
Section 7. Other Liabilities.					
Section 8. Life Insurance Held. (Face amount, cash surrender value, insurance company, and beneficiary)					
I authorize surety to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of qualifying for surety bonds.					
Signature:		Date:	Social Security Number:		
Signature:		Date:	Social Security Number:		