Maverick Consulting Group
888-307-8781

Personal Financial Statement - Confidential

☐ If this statement relates to your guaranty of the indebtedness of other person(s), firm(s) or corporation(s) complete Sections 1 and 3.

SECTION 1-INDIVIDUAL INFORMATION (Type or Print)	**SECTION 2- OTHER PARTY INFORMATION (Type or Print)**
Name	Name
Residence Address	Residence Address
City, State & Zip	City, State & Zip
Position or Title	Position or Title
Business Name	Business Name
Business Address	Business Address
City, State & Zip	City, State & Zip
Res Phone Bus Phone	Res Phone Bus Phone

SECTION 3-STATEMENT OF FINANCIAL CONDITION AS OF _____ (Date)					
ASSETS In Dollars	Indiv	Joint	LIABILITIES	Indiv	Joint
Cash / CD's (Sch A)			Notes to Banks – unsecured (Sch A)		
U.S. Govt & Marketable Securities (Sch B)			Notes to Banks – secured (Sch A)		
Securities held in Margin Account (Sch B)			Due to Brokers		
Cash Value – Life Insurance (Sch C)			Loan Against Life Insurance (Sch C)		
			Notes Payable to Others (Sch A)		
Real Estate Owned (Sch D)			Real Estate Mortgages Payable (Sch D)		
Partial Interest in Real Estate Equities (Sch E)			Real Estate Mortgages Payable – Partial Interest in Real Estate Equities (Sch E)		
Non-Marketable Securities (Sch F)			Accounts and Bills Due		
Partnership Interests – Non Real Estate			Unpaid Income Taxes & Interest		
Accounts / Notes Receivable (Sch G)			Other		
IRA/KEOGH					
Personal Property					
			TOTAL LIABILITIES		
			NET WORTH		
TOTAL ASSETS			TOTAL LIAB AND NET WORTH		

Annual Income For Year Ended _____	Contingent Liabilities			Estimated Amounts		PERSONAL INFORMATION
Salary, bonuses & commissions $_____		Yes	No	$		Do you have a will?_____ If so, name of executor
Dividends and Interest $_____	Do you have any…..					Are you a partner or officer in any other venture? If so, describe.
Real estate income (gross) $_____	Contingent liabilities (as endorser, co-maker or guarantor? On leases? On Contracts?	☐	☐			Are you obligated to pay alimony, child support, or separate maintenance payments? If so, describe.
Other Income $_____	Involvement in pending legal actions?	☐	☐			Are any assets pledged other than as described on schedules? If so, describe.
(alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.)	Other special debt or circumstances?	☐	☐			Income tax settled through (date) _____
	Contested income tax liens? If "yes" to any question(s) describe:	☐	☐			Are you a defendant in any suits or legal actions?
Total Income $_____	Total Contingent Liabilities		$			Have you ever been declared bankrupt? If so, describe.

Adjusted Gross Income Per U.S. Tax Return		MARITAL STATUS (Do not complete if this is submitted for individual unsecured credit)	No. of Dependents
for 20_____ $ _____		☐ Married	
		☐ Separated	
for 20_____ $ _____		☐ Unmarried (including single, divorced or widowed	

SCHEDULE A - BANK AND OTHER INSTITUTIONAL RELATIONSHIPS

Name & Address of Bank	Cash/CD Balance	Loan Balance	High Credit	Monthly Payment	Maturity Date	Collateral

SCHEDULE B – U.S. GOVERNMENTS & MARKETABLE SECURITIES

Number of Shares Face Value (Bonds)	Description	In Name Of	Are They Pledged?	Cost	Market Value

SCHEDULE C – LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE

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

SCHEDULE D – REAL ESTATE OWNED

Address & Type of Property	Title in Name Of	Date Acquired	Cost	Market Value	Monthly Payment	Mortgage Maturity	Mortgage Balance

SCHEDULE E – PARTIAL INTERESTS IN REAL ESTATE EQUITIES (Represents your Ownership Interest Only)

Address & Type of Property	Title in Name Of	Date Acquired	% of Ownership	Cost	Market Value	Monthly Payment	Mortgage Maturity	Mortgage Balance

SCHEDULE F – NON-MARKETABLE SECURITIES

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

SCHEDULE G – ACCOUNTS AND NOTES RECEIVABLE

Name and Address of Debtor	Amount Owing	Monthly payment	Interest Rate	Nature of Debt	Description of Collateral	Date payment Expected

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 favor. Each undersigned understands that you 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 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) _____ Signature (Other Party) _____

S.S. No. _____Date of Birth _____ S.S. No. _____Date of Birth _____

Date Signed _____ Date Signed _____

Fax Back To: 888-226-0081 Attn: Liz