

Personal Financial Statement

Broadbridge, Inc.
Business Sales and Acquisitions

Name: _____

As of (Date): _____

This Personal Financial Statement provided to:			
Assets:		Liabilities:	
Cash On Hand and in Financial Institutions (List Banks etc.) -		Notes Payable, to lenders or individuals, secured or unsecured	
		Unpaid bills	
Money Market Funds, List Below - (Note 1)			
Investments, List Below -		Unpaid income taxes	
		Credit Card Debt, List Here -	
		Other debt, List Here -	
Homestead and Real Estate Owned (Note 2)			
Personal Residence			
Recreation Property / Second Home			
value (Note 3) -			
		Real Estate Mortgages Payable -	
Automobiles, List Here -		Personal Residence	
		Recreation Property / Second Home	
		Residential Rental Property	
Other Personal Property			
		Real Estate Taxes Payable	
Equity in Corporation(s) owned (Note 4):		Personal Residence	
Corporation name		Recreation Property / Second Home	
		Residential Rental Property	
Retirement Plans / Accounts -			
IRA		Total Liabilities	
Other			
		Net Worth	
Total Assets		Total Liabilities and Net Worth	

Personal Financial Statement

*Broadbridge, Inc.
Business Sales and Acquisitions*

Name: _____

As of (Date): _____

Sources of Income for Year Ended 12/31/___:		Contingent Liabilities:	
Earnings		As endorser, co-maker or guarantor	
		Legal	
Interest and Dividends to date		Other	
Real Estate Rental Income			

Notes to Personal Financial Statement, and Other Personal Information:

Enter any notes, comments, edits in the appropriate section below:

- Note 1. None of the cash or equivalent accounts are pledged.
- Note 2. Homestead or other Real Estate -
- Note 3. Residential Rental Property
- Note 4. Equity in Corporation(s) owned
- Note 5. I have/ have no assets that are pledged or restricted
- Note 6. I have / do not have a current will.
- Note 7. I have / do not have substantial life insurance in force as of this date.
- Note 8. I have / have not obtained credit from other commercial or personal banking lenders in the recent past. I have unused credit lines on credit cards as follows:

Credit Card Name	Credit Card Number	Total Credit	Credit Used	Credit Unused

I certify that the above is true and complete. I authorize the Lender to verify this information and to obtain additional information. Lender may rely on this statement without further verification. I agree to notify Lender in writing of any material change to the accuracy of this statement.

Applicant Signature	Date Signed
(Print / Type Name)	Street
I am a Married / an Unmarried Wisconsin Resident	City, State Zip
	Phones - Res..
	- Cell