



10055 West Gulf Bank  
Houston, TX 77040

**PERSONAL FINANCIAL STATEMENT**

Email to eBonds@bch-insurance.com



Phone

Name		
Address		
Business or Occupation		Partner of Officer in any other venture?
Are any assets pledged?	Have you ever made a composition settlement or filed bankruptcy?	
	Explain:	

**ASSETS**

**LIABILITIES AND NET WORTH**

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

**INCOME****CONTINGENT LIABILITIES**

Salary	\$	As Endorser or Co-Maker	\$
Bonus and Commissions	\$	On Loans or Contracts	\$
Dividends and Interest	\$	Legal Claims	\$
Real Estate Income	\$	Provisions for Federal Income Tax	\$
		Other Special Debt	\$
<b>TOTAL INCOME</b>	\$		

**INSURANCE COVERAGE****COMPARISON OF MONTHLY INCOME  
AND EXPENSES**

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

**SCHEDULES****No. 1 Banking Relations. (A 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. (A list of the largest amounts owing to me.)**

Name and Address of Debtor	Amount Owing	Age of Debt	Description or Nature of Debt	Description of Security Held	Date Payment Expected
	\$				
	\$				
	\$				
	\$				
	\$				
	\$				

**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 Receive 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 \_\_\_\_\_