



Personal Financial Statement

NAME	AS OF DATE
ASSETS	
Cash, Checking, Savings, Money Market, Time Deposits	
Cash Value of Life Insurance	
Stocks and Bonds (Publicly traded, listed)	
Stocks and Bonds (Not publicly traded, listed)	
Accounts and Notes Receivable	
Mortgage and Contracts for Deeds Owned	
Annuities	
Retirement Accounts	
Closely Held Business Interests	
Real Estate-Homestead	
Real Estate-Other	
Real Estate-Time Shares	
Oil and Gas	
Automobiles	
Personal Property	
Other Assets	
Assets Held Outside the U.S.	
TOTAL ASSETS:	
LIABILITIES	
Installment Loans Payable to Institutions	
Installment Loans Payable to Individuals	
Credit Card Debt	
Lines of Credit	
Income Taxes Payable	
Other Taxes Payable	
Mortgage on Homestead-1 st Lien	
Mortgage on Homestead-2 nd Lien	
Mortgages or Liens on Other Real Estate	
Contracts for Deed	
Other Liabilities-Partnerships	
Other Liabilities-Closely Held Businesses	
Other Liabilities	
Total Liabilities	
Net Worth	



Personal Financial Statement

INCOME

Personal Income	
Wages, Salary	
Pensions and Annuities	
Social Security Benefits	
Other (Specify) Trust Income	
Other (Specify)	
Total Personal Income	
Business/Real Estate Income	
Sales/Rent Revenue	
Operating Expenses	
Other Income (Specify) Sale of Assets	
Other Expenses (Specify) Uninsured Losses	
Total Business Income	
Total Income	

LIST UNUSUAL PERSONAL EXPENSES BELOW

Signature:

Date:



Certification of Personal Financial Statement

To: Gradient Mortgage Capital, LLC
1 East Broward Blvd., Suite 700
Fort Lauderdale, Florida 33301

_____, hereby certifies that the
Your Full Name
information contained in the attached personal financial statement is true, correct, and
complete to the best of my knowledge as of _____.
Date

I understand that this personal financial statement will be used in connection with my application for credit with Gradient Mortgage Capital, LLC, and that any false or misleading information provided may result in the rejection of my application or other consequences as allowed by law.

I authorize Gradient Mortgage Capital, LLC to verify the accuracy of the information provided, including obtaining credit reports and contacting financial institutions or other references.

I acknowledge and accept responsibility for promptly notifying Gradient Mortgage Capital, LLC of any material changes to the information provided in this personal financial statement.

Signed:

Signature

Full Name

Date