



Your Bonding Resource Center!

## PERSONAL FINANCIAL STATEMENT

### SUBMISSION INSTRUCTIONS:

a) Please fill out the form and use the “Submit Application” button at the end of the page to deliver your form by email.

**-OR-**

b) You can fill out, print, then send or fax your completed form to Southwest Bonding Company.

***Your emergency is our emergency, an underwriter will respond to your request within 24 hours of receipt.***

#### **Texas**

201 Main Street #600  
Fort Worth, TX 76102  
Phone: 817-349-6038  
Fax: 817-349-6040  
[info@southwestbonding.com](mailto:info@southwestbonding.com)

#### **San Diego**

401 West A Street #1810  
San Diego, CA 92101  
Phone: 619-231-9522  
Fax: 619-231-9545  
[sandiego@bondservices.com](mailto:sandiego@bondservices.com)

#### **Orange County**

2700 N. Main St. #1105  
Santa Ana, CA 92705  
Phone: 888-558-3007  
Fax: 714-558-8297  
[orangecounty@bondservices.com](mailto:orangecounty@bondservices.com)

#### **Los Angeles**

900 Wilshire Blvd #1400  
Los Angeles, CA 90017  
Phone: 213-628-2970  
Fax: 213-628-2977  
[losangeles@bondservices.com](mailto:losangeles@bondservices.com)

#### **Inland Empire**

290 W. Orange Show Rd. #109  
San Bernardino, CA 92408  
Phone: 909-890-1409  
Fax: 909-890-4282  
[sanbernardino@bondservices.com](mailto:sanbernardino@bondservices.com)

#### **San Jose**

55 South Market St. #1060  
San Jose, CA 95113  
Phone: 408-998-5056  
Fax: 408-279-3160

#### **Concord**

2300 Clayton Road #1440  
Concord, CA 94520  
Phone: 925-676-2663  
Fax: 925-676-2339  
[concord@bondservices.com](mailto:concord@bondservices.com)

#### **Sacramento**

7221 South Land Park Drive  
Sacramento, CA 95831  
Phone: 916-424-0435  
Fax: 916-424-0437  
[sacramento@bondservices.com](mailto:sacramento@bondservices.com)

#### **Arizona**

20325 N. 51st Ave. #134  
Glendale, AZ 85308  
Phone: 623-362-0601  
Fax: 623-362-2218  
[az@bondservices.com](mailto:az@bondservices.com)



**PERSONAL FINANCIAL STATEMENT**  
**NOT TO BE USED FOR BUSINESS STATEMENTS**

To include COMPANY to become surety for the Undersigned, or to accept the Undersigned as Indemnitor the Undersigned submits the following Financial Statement

Personal financial statement of \_\_\_\_\_ SS.NO. \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Street Address, City, State, Zip)

HOME PHONE NO. ( ) \_\_\_\_\_ BUS.PHONE NO. ( ) \_\_\_\_\_

NAME OF SPOUSE \_\_\_\_\_

AS OF \_\_\_\_\_  
(Date)

CURRENT ASSETS		CURRENT LIABILITIES	
Cash on hand(not in bank) .....		Notes payable to (names and addresses):	
Cash in following banks (names and addresses):		.....	
.....		.....	
.....		.....	
Stocks and bonds (Schedule 1) .....		Accounts payable .....	
Accounts receivable (Schedule 2) .....		Current portion of long term debt .....	
Notes receivable (Schedule 3) .....		Other current liabilities (Schedule 6)	
Other current assets (Schedule 6)		.....	
.....		.....	
.....		Current Year's Income Taxes Unpaid .....	
.....		Prior Year's Income Taxes Unpaid .....	
.....		Real Estate Taxes Unpaid .....	
.....		.....	
<b>TOTAL CURRENT ASSETS:</b>		<b>TOTAL CURRENT LIABILITIES:</b>	
<b>FIXED ASSETS</b>		<b>LONG TERM LIABILITIES</b>	
Real estate (Schedule 4):		Real estate debt (Schedule 4):	
Residence .....		Residence .....	
Other .....		Other .....	
Cash value of life insurance (Schedule 5) .....		Borrowed on life insurance (Schedule 5) .....	
.....		.....	
Other assets and investments (Schedule 6) .....		Other long term debt (Schedule 6) .....	
.....		.....	
.....		.....	
.....		.....	
.....		<b>TOTAL LONG TERM LIABILITIES:</b>	
<b>TOTAL FIXED ASSETS:</b>		<b>NET WORTH:</b>	
<b>TOTAL ASSETS:</b>		<b>TOTAL LIABILITIES AND NET WORTH:</b>	

CONTINGENT LIABILITIES

FOR ENDORSEMENTS OR GURANTEES \$ \_\_\_\_\_ FOR OTHER PURPOSES \$ \_\_\_\_\_

GIVE DETAILS \_\_\_\_\_

\_\_\_\_\_

**1. STOCKS AND BONDS**

Name of Security	No. Shares	If any pledge, State to Whom and for What Purpose	Dividends Paid Last Two Years	Market value	Book Value
TOTALS				\$	\$

**2. ACCOUNTS RECEIVABLE**

Name and Address (street and city) From Whom Due	For What is it Due	When Sold	When Due	Amount
TOTAL				\$

**3. NOTES RECEIVABLE**

Name and Address (street and city) From Whom Due	For What Due	How Secured	Date	Maturity	Amount
TOTAL					\$

**4. REAL ESTATE**

Description of Property	Title in of Name	Market Value	Cost	Date Acquired	Amount Encumbrance	Monthly Payments	Monthly Income
TOTAL		\$	\$	\$	\$	\$	\$

**5. LIFE INSURANCE - CASH VALUE**

Name of Company	Policy Number	Name of Insured	Beneficiary	Face Value	Cash Value	Amount Borrowed

**6. OTHER ASSETS AND LIABILITIES**

Other Current Assets (Itemize)	Other Current Liabilities (Itemize)	Amount

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 other, 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 credit worthiness. You are authorized to answer questions about your credit experience with me/us.

Signature \_\_\_\_\_  
S.S.No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Date Signed \_\_\_\_\_, \_\_\_\_\_

Signature \_\_\_\_\_  
S.S.No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Click the "Submit Application" button to send your secure online form to Southwest Bonding Company.