



Personal Financial Statement

Name: _____

Employer: _____

Residence Address:

Street _____ City _____ County _____ State _____ ZIP _____

Own? Yes No

How Long: Years Months

ASSETS	
Checking / Savings *	\$
IRA / 401K (Sched "A") *	\$
Stocks / Bonds (Sched "A") *	\$
Real Estate Owned (Sched "B")	\$
1	\$
2	\$
3	\$
Vehicles (Year, Make, Model)	\$
1	\$
2	\$
3	\$
Cash Surrender Value of Life Insurance	\$
Other Assets (Describe)	\$
1	\$
2	\$

LIABILITIES	
Revolving Debt (Credit Cards)	\$
Installment Loans (Auto/Personal)	\$
1st Mortgage on Residence (Sched "B")	\$
Other Mortgage on Residence (Sched "B")	\$
Mortgages on Other Real Estate (Sched "B")	\$
Taxes and Assessments Payable	\$
Loans against Life Insurance	\$
1 Other Liabilities (Describe)	\$
2	\$
3	\$

TOTAL LIABILITIES (B)	\$
NET WORTH (A - B)	\$

* Please provide backup documentation for all Cash and Investments including 401K/IRA accounts.

CASH VERIFIED?
YES _____ NO _____

TOTAL ASSETS (A)	\$
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ANNUAL INCOME	
Annual Income** - Salary/Commissions	\$
Bonuses/Distributions	\$
Real Estate Income	\$
Investment Income	\$
Notes Receivable	\$
Other Income	\$
TOTAL ANNUAL INCOME	\$

ANNUAL EXPENDITURES	
Real Estate Mortgages (P & I)	\$
Rental Expenses	\$
Credit Cards/Loans	\$
Income, Insurance & Property Taxes	\$
Investments	\$
Living Expenses	\$
TOTAL ANNUAL EXPENDITURES	\$

**Please provide the first two pages of your Federal Tax Return, along with copies of W-2's, K-1 (partnerships/S-Corp) and/or Schedule "C" statements.

TAX RETURN VERIFIED?
YES _____ NO _____

I hereby warrant to The Irvine Company that this personal financial statement is complete and correct as of the date prepared and fairly represents my financial condition and that I will promptly inform The Irvine Company of any material changes in the information provided. All information provided will be kept confidential.

By: _____
SIGNATURE DATE



Personal Financial Statement (Schedule "A" & "B")

IRA / 401K / STOCKS / BONDS - SCHEDULE "A"

Number of Shares / Units	Name of Stock, Bond or Fund	Registered in the Name of:	Pledged? To Whom?	Market Value
				\$
				\$
				\$
				\$
				\$
				\$
				\$
				\$

REAL ESTATE - SCHEDULE "B"

PROPERTY TYPE: SF = Single-Family, MF = Multi-Family, C = Commercial, L = Land

Address	Property Type	Year Acquired	Cost	Loan(s) Balance	Lender	Value	Title in name of: % of Ownership
			\$	\$		\$	
			\$	\$		\$	
			\$	\$		\$	
			\$	\$		\$	
			\$	\$		\$	
			\$	\$		\$	
			\$	\$		\$	
			\$	\$		\$	

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