

Personal Financial Statement

Name: _____ Employer: _____

Residence Address: _____
Street City County State Zip

Own? Yes No

How Long? Years Months

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

LIABILITIES	
Revolving Debt (Credit Cards)	\$
Installment Loans (Auto/Personal)	\$
1st Mortgage on Residence (Schedule "B")	\$
Other Mortgage on Residence (Schedule "B")	\$
Mortgage on Other Real Estate (Schedule "B")	\$
Taxes and Assessments Payable	\$
Loans against Life Insurance	\$
Other Liabilities (Describe)	\$
1.	\$
2.	\$
TOTAL LIABILITIES (B)	\$
NET WORTH (A-B)	\$

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

CASH VERIFIED?
 YES NO

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	Number 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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