

Southern Community

BANK AND TRUST

PERSONAL FINANCIAL STATEMENT

Winston-Salem / Yadkinville / Kernersville

P.O. Box 26134 • Winston-Salem, NC 27114-6134 • Telephone 336-768-8500 • Fax 336-768-2552

CONFIDENTIAL

Personal Information			
Name:		Employer:	
Spouse:		Employer:	
Home Address:		Employer Address:	
Home Phone:	Work Phone:	No. of years in job:	Position/Title:
Social Security #	Date of Birth:	Previous employer if less than three years:	
Spouse's Social Security #:	Date of Birth:	Previous employer if less than three years:	
Are you a defendant in any legal actions? If yes, describe: <input type="checkbox"/> Yes <input type="checkbox"/> No		Banks where credit has been obtained:	
Have you ever been bankrupt in the last 10 years? If yes, please give chapter and status: <input type="checkbox"/> Yes <input type="checkbox"/> No		Other business affiliations:	
Do you have a will? Executor: <input type="checkbox"/> Yes <input type="checkbox"/> No		Personal bank accounts at which banks:	

Personal Balance Sheet (round to nearest dollar)					
ASSETS			LIABILITIES		
	Dollars	Joint (Y/N)		Dollars	Joint (Y/N)
Cash in financial institutions:			Notes payable to banks: (Schedule C)		
Marketable Securities: (Schedule A)			Notes payable to others: (Schedule C)		
Accounts & Notes: (Schedule B)			Real Estate Mortgages: (Schedule D)		
Personal Real Estate: (Schedule D)			Real Estate Investments: (Schedule E)		
Real Estate Investments: (Schedule E)			Credit Card/Lines of Credit: (Schedule C)		
Automobiles:			Auto Loans:		
Cash Value Life Insurance: (Schedule F)			Loans on Life Insurance: (Schedule F)		
Business Ventures: (Schedule G)			Taxes Payable:		
Vested Profit Sharing / IRA / 401-K:			Other Liabilities - Itemize:		
Other Assets - Itemize:					
			TOTAL LIABILITIES:		
			NET WORTH (Assets minus total liabilities):		
TOTAL ASSETS:			TOTAL LIABILITIES & NET WORTH		

