



2035 Hogback Road
 Ann Arbor, Michigan 48105
 800-543-5600 • 734-677-3000 • Fax: 888-855-6625
 www.ownerbuilderloan.com

Personal Financial Statement (Page 1 of 2)

Borrower				Co-Borrower			
Name							
Home Address							
City/ST/Zip							
How Long?	Yrs: Mos:	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	Yrs: Mos:	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	
Home Phone							
Work Phone							
Social sec #		Age:		Age:			
Marital Status		<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Separated		<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Separated			
Employer							
Emp. Address							
City/ST/Zip							
Occupation							
How Long?	Years this job:	Yrs this line of work:		Years this job:	Yrs this line of work:		
Self Employed?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, % ownership: Type:			<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, % ownership: Type:			
	<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation			<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation			

Borrower Assets		Market Value	Co-Borrower Assets		Market Value
Bank Acct. #		\$	Bank Acct. #		\$
Bank Acct. #		\$	Bank Acct. #		\$
Bank Acct. #		\$	Bank Acct. #		\$
Bank Acct. #		\$	Bank Acct. #		\$
Listed Stocks and Bonds		\$	Listed Stocks and Bonds		\$
Life Insurance net cash value Face amount \$		\$	Life Insurance net cash value Face amount \$		\$
Real estate owned (Enter total market value from schedule of real estate owned - page 2)		\$	Real estate owned (Enter market value from schedule of real estate owned - page 2)		\$
401(k) / retirement accts. (vested interest)		\$	401(k) / retirement accts. (vested interest)		\$
Business(es) owned (list % ownership)		\$	Business(es) owned (list % ownership)		\$
Autos (list year and make)		\$	Autos (list year and make)		\$
Accounts and notes receivable		\$	Accounts and notes receivable		\$
Other assets		\$	Other assets		\$
Total Assets:			Total Assets:		



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Personal Financial Statement (Page 2 of 2)

Borrower Liabilities			Co-Borrower Liabilities		
	Balance	Mo. Pymt		Balance	Mo. Pymt
Credit cards/lines of credit (itemize)	\$	\$	Credit cards/lines of credit (itemize)	\$	\$
Real estate mortgages (Enter total from schedule of real estate owned)	\$	\$	Real estate mortgages (Enter total from schedule of real estate owned)	\$	\$
Auto Loans	\$	\$	Auto Loans	\$	\$
Other Liabilities (itemize)	\$	\$	Other Liabilities (itemize)	\$	\$
Total Liabilities:			Total Liabilities:		
Net Worth (assets minus liabilities):			Net Worth (assets minus liabilities):		

Monthly Income		Declarations	
Borrower salary	\$	Are you party to any claim or lawsuit?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Spouse's salary	\$	Are there any outstanding judgments against you?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Net rental income	\$	Have you ever filed bankruptcy?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other (itemize)	\$	Chapter: _____ Discharge date: _____	
Total Monthly Income:	\$	Do you owe taxes for any prior tax years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
		Amount: \$ _____ Owed to: _____	
		<i>Note: Answering "yes" to any above does not disqualify you for a loan.</i>	

Schedule of Real Estate Owned							
Property Address (enter S if sold, PS if pending sale or R if rental being held for income)	Present Market Value	Amount Mortgage & Liens	Gross Rental Income	Mortgage Payments	Insurance, maintenance, taxes & misc.	Net Income	
	\$	\$	\$	\$	\$	\$	
	\$	\$	\$	\$	\$	\$	
	\$	\$	\$	\$	\$	\$	
Totals:	\$	\$	\$	\$	\$	\$	

I/We certify that the information provided is true and correct and authorize Lender to verify information directly or through a credit agency.

X _____
 Borrower Date

X _____
 Co-borrower Date

What to do next? Fax this form along with your Construction Loan Application to 888-855-6625.
 We will contact you with your results. Thank you very much.