

**Noddle Surety & Insurance Services, Inc.**

20121 Ventura Boulevard, Suite 104

Woodland Hills, CA 91364

Tel: 818 881-1011

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**Personal Financial Statement**

AS OF \_\_\_\_\_, \_\_\_\_\_

Name: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Residence Address: \_\_\_\_\_

<b>Assets</b>					<b>Liabilities</b>					
<b>Cash in Bank</b> (Please attach most recent bank statements)					<b>Accounts/Notes/Loans Payable</b>					
<u>Bank Name and Number</u>	<u>Location</u>	<u>Account No.</u>	<u>Amount</u>		<u>To Whom</u>	<u>Address</u>	<u>Due Date</u>	<u>Security</u>	<u>Amount</u>	
<b>Accounts/Notes Receivable</b>										
<u>From Whom</u>	<u>Address</u>	<u>Due Date</u>	<u>Security</u>	<u>Amount</u>						
<b>Investments</b> (Please attach copies of the most recent investment portfolio statements)										
<u>Name &amp; No (s) of Instrument</u>	<u>No. Shares</u>	<u>Price/Share</u>	<u>Market Value</u>							
<b>Real Estate</b>					<b>Mortgage Payable</b>					
<u>Description</u>	<u>Address</u>	<u>Title in Name of</u>	<u>Date Acquired</u>	<u>Cost</u>	<u>Market Value</u>	<u>To Whom</u>	<u>Address</u>	<u>Monthly Payments</u>	<u>Monthly Income</u>	<u>Loan Balance</u>
<b>Cash Value of Life Insurance</b>										
<u>Name of Company</u>	<u>Name of Insured</u>	<u>Policy No.</u>	<u>Beneficiary</u>	<u>Face Value</u>	<u>Cash Value</u>					
<b>Other Assets</b>					<b>Borrowed on Life Insurance</b>					
<u>Description</u>	<u>Amount</u>				<u>Loan Balance</u>					
<b>Total Assets</b>					<b>Total Liabilities</b>					
					<b>Net Worth (Total Assets less Total Liabilities)</b>					

The maker of the foregoing financial statement hereby authorizes the company to confirm the bank balances claimed and all other items comprising said statement.

By: \_\_\_\_\_ Date: \_\_\_\_\_