

**Stonehedge Funding, LLC.**  
**P.O. Box 460, Uwchland PA, 19480**  
**Phone: 610-873-6022**  
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**www.stonehedgefunding.com**

**PERSONAL FINANCIAL STATEMENT AS OF \_\_\_\_\_**

**PERSONAL INFORMATION**

<b>APPLICANT</b>			<b>CO-APPLICANT</b>		
Name			Name		
Home Address			Home Address		
Home Phone	Cell Phone	E-mail	Home Phone	Cell Phone	E-mail
Social Security No.		Date of Birth	Social Security No.		Date of Birth
Employer			Employer		
Address of Employer			Address of Employer		
Business Phone Number	No. of years with employer	Title/Position	Business Phone Number	No. of years with employer	Title/Position
Name of Previous Employer & Position (if with current employer less than 3 yrs.)			Name of Previous Employer & Position (if with current employer less than 3 yrs.)		

**Cash**

Annual Income	Amount (\$)
Salary (applicant)	
Salary (co-applicant)	
Bonuses & Commissions (applicant)	
Bonuses & Commissions (co-applicant)	
Rental Income	
Interest Income	
Dividend Income	
Capital Gains	
Partnership Income	
Other Investment Income	
Other Income (List)	
<b>TOTAL INCOME</b>	<b>\$</b>

Annual Expenditures	Amount (\$)
State Income and Other Taxes	
Rental Income and Other Taxes	
Rental Payments, Co-op or Condo Maintenance	
Residential	
Mortgage Payments	
Investment	
Residential	
Property Taxes	
Investment	
Interest & Principle Payments on Loans	
Insurance	
Investments (including tax shelters)	
Alimony /Child Support	
Tuition	
Other Living Expense	
Medical Expenses	
Other Expenses (List)	
<b>TOTAL EXPENDITURES</b>	<b>\$</b>

Any significant changes expected in the next 12 months \_\_\_\_ Yes \_\_\_\_ No  
 (If yes, attach information)

\*\*Income from alimony, child support, or separate maintenance income need not be revealed if the applicant or co-applicant does not wish to have it considered as a basis for repaying this obligation.

# Stonehedge Funding, LLC

Balance Sheet as of \_\_\_\_\_

ASSETS	AMOUNT (\$)	LIABILITIES	AMOUNT (\$)
Cash on hand in bank (including money market accounts, CDs)	\$	Notes Payable to this Bank	
		Secured	\$
Savings Account (List) (including money market accounts, CDs)		Unsecured	
		Notes Payable to Others (Schedule E)	
		Secured	
		Unsecured	
		Accounts Payable (including credit cards)	
		Margin Accounts	
Readily Marketable Securities (Schedule A)		Notes Due: Partnership (Schedule D)	
Non-Readily Marketable Securities (Schedule A)		Taxes Payable	
Accounts and Notes Receivable		Mortgage Debt (Schedule C)	
Net Cash Surrender Value of Life Insurance (Schedule B)		Life Insurance Loans (Schedule B)	
Residential Real Estate described in attached Real Estate Investments (Schedule C) must		Other Liabilities (List):	
Partnerships / PC Interests (Schedule D)			
IRA, Keogh, Profit-Sharing & Other Vested Retirement Accts.			
Deferred Income (number of years deferred )			
Personal Property (including automobiles)			
Other Assets (List):			
		<b>TOTAL LIABILITIES</b>	
		<b>NET WORTH</b>	
	\$		\$

**CONTINGENT LIABILITIES** \_\_\_\_\_ **YES** **NO** **AMOUNT**

- Are you a guarantor, co-maker, or endorser for any debt of an individual, corporation, or partnership?
- Do you have any tax liens or judgments?
- Are there any suits or legal actions pending against you?
- Are you contingently liable on any lease or contract?

Schedule A • All Securities (including non-money market mutual funds)							
	DESCRIPTION	OWNER(S)	WHERE HELD	COST	CURRENT MARKET VALUE	PLEGGED	
						YES	NO
<b>READILY MARKETABLE SECURITIES (including U.S. Governments and Municipals) *</b>							
<b>NON-READILY MARKETABLE SECURITIES (closely held, thinly traded, or restricted stock)</b>							

\* If not enough space, attach a separate schedule or brokerage statement and enter totals only.



# Stonehedge Funding, LLC.

## Please Answer the Following Questions:

1. Income tax returns filed through (date): \_\_\_\_\_ Are any returns currently being audited or contested?  Yes  No  
If yes, what year(s)? \_\_\_\_\_
2. Have (either of) you or any firm in which you were a major owner ever declared bankruptcy?  Yes  No If yes, please provide details: \_\_\_\_\_
3. Have you drawn a will?  Yes  No If yes, please furnish the name of the executory) and year will was drawn: \_\_\_\_\_
4. Number of dependents (excluding self) and relationship to applicant \_\_\_\_\_
5. Have you ever had a financial plan prepared for you?  Yes  No
6. Did you include two years federal and state tax returns (*must be current*)?  Yes  No
7. Do (either of) you have a line of credit or unused credit facility at any other institution(s)?  Yes  No If so, please indicate where, how much, and name of banker \_\_\_\_\_
8. Do you anticipate any substantial inheritances?  Yes  No  
If yes, please explain: \_\_\_\_\_

## **Representations and Warranties**

The information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledge and understand that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. If the undersigned fail to notify you as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, you may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, immediately due and payable. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorize any person or consumer reporting agency to give you any information it may have on the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned. As long as any obligation or guarantee of the undersigned to you is outstanding, the undersigned shall supply annually an updated financial statement. This personal financial statement and any other financial or other information that the undersigned give you shall be your property.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Applicant Signature

**\*Please provide valid I.D with submission of this application\***