

PERSONAL FINANCIAL STATEMENT AS OF _____, 2022

Separate financial statements are required unless all information will apply to joint parties.

There will be a one-time application fee of \$50.00.

A CURRENT COPY OF DRIVERS LICENSE MUST ALSO BE PROVIDED

PERSONAL INFORMATION		
Name	Employer Name	
Social Security Number	Business Address	
Date of Birth	Business Phone No.	No. of Years Employed
Home Address City, State, Zip	Partner or Officer in any Other Business	
Phone No.	Name of your Accountant	
Email	Phone No./Email of your Accountant	

ASSETS			LIABILITIES		
Checking/Saving Account Information					
Name of Bank	Account #	Amount	Contact Name at Bank	Contact's Phone #	
Cash on hand and in banks			Notes Payable – Secured		
Salary			To banks – Unsecured		
Notes receivable			Notes Payable to others		
Stocks and Bonds – see Schedule A			Accounts Payable		
Real Estate – see Schedule B			Unpaid Taxes		
Cash value of life insurance See Schedule C			Mortgages on Real Estate Payments See Schedule B		
Accounts receivable			Alimony/Child Support		
Automobiles			Other Debts (itemize)		
Other Assets (itemize)					
			TOTAL LIABILITIES		
TOTAL ASSETS			NET WORTH (ASSETS LESS LIABILITIES)		

SOURCE OF ANNUAL INCOME		
Salary		
Bonus and Commissions		
Dividends		
Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.		
Other Income (Itemize)		
TOTAL		

GENERAL INFORMATION		
Contingent Liabilities – As endorser or co-maker		
Unsatisfied Judgments or Law Suites pending		
Are any income tax returns made by you for prior years being contested?		
If so, what do you estimate as the additional amount you may be required to pay?		
Are you obligated to pay alimony, child support, or separate maintenance payments?		
Are any assets pledged or in joint names other than as described on Schedules?		
Have you ever been declared bankrupt?		
Do you have a will? Who is named as your executor?		



SCHEDULE A – STOCKS AND BONDS

No. of Shares Face Value In (Bonds)	Description (include maturity on bonds)	In Name Of	Are These Pledged?	Market Value

SCHEDULE B – REAL ESTATE

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

SCHEDULE C – LIFE INSURANCE

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

SCHEDULE D – DEPOSIT ACCOUNTS AND CREDIT WITH FINANCIAL INSTITUTIONS (BANKS, SAVINGS AND LOAN ASSOCIATIONS, AND CREDIT UNIONS)

Name & Address Of Institution	Account Or Credit In The Name Of	Account Cash Balance	Original Loan Amount	Secured Or Unsecured	Original Date	Maturity Date	Current Loan Balance

(USE ADDITIONAL SCHEDULES IF NECESSARY)

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you for the undersigned, or persons, firms, or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. I (we) understand that you are relying on this information (including the designation made as to ownership of property) in deciding to grant or continue credit. I (we) represent and warrant that the information provided is true and complete. You may consider this statement to be true and correct until I (we) notify you in writing of a change. You are authorized to make all inquiries you consider necessary to verify the accuracy of these statements and to determine my (our) creditworthiness, including, but not limited to requesting and obtaining copies the credit reports from any of the major credit reporting bureaus (Experian, Trans Union, etc.) of all applicants, tenants and/or lease guarantors at any time during the term of the lease, or after the term of the lease if there remain any outstanding monetary obligations due and owing from applicants, tenants or lease guarantors to LANDLORD. Upon written request, we will provide all applicants, tenants or lease guarantors with a copy of any credit report that LANDLORD has obtained as authorized by this term. You are authorized to answer questions about your credit experience with me (us).



Date signed _____, 2022

SIGNATURE (Individual)



COLUMBIA RETAIL MANAGEMENT

BUSINESS PROFILE QUESTIONNAIRE

1) TENANT LEGAL ENTITY _____
ADDRESS _____

(Attach a copy of Certificate of Incorporation & Corporate Resolution)

2) PERSONAL GUARANTY
NAME: _____
ADDRESS: _____

SOCIAL SECURITY # OR DUN & BRADSTREET #: _____
(Attach most recent Financial Statements)

3) TYPE OF BUSINESS: _____

4) DO YOU HAVE OTHER LOCATIONS? _____
IF YES, HOW MANY? _____
WHERE? _____

5) VALUATION OF BEGINNING INVENTORY? _____

6) HOW MUCH WILL YOU EXPEND ON INTERIOR IMPROVEMENT?

7) HOW MUCH WILL YOU EXPEND FOR STORE FIXTURES? _____

8) PROJECTED FIRST YEAR SALES? _____

9) % SALES INCREASE ANNUALLY OVER THE LEASE TERM PERIOD?

YEAR 2 _____
YEAR 3 _____
YEAR 4 _____
YEAR 5 _____

10) DETAIL YOUR LENGTH OF EXPERIENCE & QUALIFICATIONS REQUIRED TO OPERATE
THE BUSINESS.

(Enclose Business Plan and/or Resume)

11) **ENCLOSE COPY OF CURRENT DRIVERS LICENSE**

12) **ENCLOSE SAMPLE MENU IF APPLYING FOR RESTAURANT CONCEPT**

