





# Five Star Leasing, LLC

PO Box 909  
 Helena, MT 59624  
 1-888-461-4440  
[www.fivestarlease.com](http://www.fivestarlease.com)

## Personal Financial Statement as of \_\_\_\_\_

Applicant

Name	SSN	Occupation	# of Years
Physical Address	City	State	Zip Code
Mailing Address (if different)	Business Phone #	Cell Phone #	

Co-Applicant

Name	SSN	Occupation	# of Years
Physical Address	City	State	Zip Code
Mailing Address (if different)	Business Phone #	Cell Phone #	

SCH. A

ASSETS		AMOUNT
Cash, Savings, Checking, Etc.	Other Institutions	\$
	Marketable Securities	\$
Stocks, Bonds, Mutual Funds & Retirement Accounts	401K, IRA, OTHER	\$
	Other Retirement	\$
Life Insurance	Cash Value	\$
Accounts & Notes Receivable		\$
Personal Residence & Other Real Estate Investments	Residence	\$
	Unimproved Land	\$
	Income Property	\$
	Other	\$
Other Assests & Personal Property		\$
<b>TOTAL ASSESTS</b>		<b>\$</b>

SCH. B

SCH. C

SCH. D

SCH. E

LIABILITIES		AMOUNT
Accounts, Loans & Notes Payable (Non-RE)	Other Institutions	\$
	Credit Cards	\$
	Revolving Accounts	\$
	Other	\$
Insurance Loans		\$
Notes & Loan Payable (RE Secured)	Residence	\$
	Unimproved Land	\$
	Income Property	\$
	Other	\$
Other Liabilities		\$
<b>TOTAL LIABILITIES</b>		<b>\$</b>
<b>NET WORTH</b>		<b>\$</b>

ANNUAL INCOME:		ANNUAL EXPENSES:		CONTINGENT LIABILITIES:	
Salaries & Wages	\$	Property Tax Assessment		Endorser on Notes	
Dividends & Interest	\$	Federal & State Income Tax		Guarantor on Notes	
Gross Rental Income	\$	Real Estate Loan Payments		Taxes	
Net Business Income	\$	Payments on Contracts		Other Contingent	
Other Income	\$	Estimated Living Expenses			
		Other Expenses			
<b>TOTAL INCOME</b>	<b>\$</b>	<b>TOTAL EXPENSES</b>	<b>\$</b>	<b>OTHER CONTINGENT</b>	<b>\$</b>

I (we) certify that the information provided is true and correct to the best of my (our) knowledge and belief. I (we) may be required to supply additional information and to provide security for the requested loan. I (we) further agree that whether or not the loan is closed, all such title evidence or other title examination expenses shall be paid by me (us) unless I (we) have exercised the right of rescission. I (we) further agree and consent that FSL may obtain a credit report or any other information relating to my (our) income or financial position and agree to pay any cost for obtaining such information. From time-to-time you may verify or exchange information to me (us) with credit reporting agencies. I (we) acknowledge that an application has been made by the individual(s), partnership(s), corporation(s) or any other legal enty(ies) names below to Five Star Leasing, LLC. I (we) further agree, consent and authorize Five Star Leasing, LLC to obtain credit and deposit information, including financial records and income tax returns from any accountant, attorney or other creditor. I (We) further agree that the authorization is in full force and effect until cancelled by me (us).

Applicant Signature \_\_\_\_\_ Date \_\_\_\_\_

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

Schedule A

CASH & LOCATION OF BANK ACCOUNTS							
CKING	CD	SAVING	Institution/Bank	Balance	Interest Paid to You	Date CD Matures	Account Pledge (Y/N)
Total				\$	\$		

Schedule B

STOCKS & BONDS (Include interest in Closely Held Businesses)						
Description	# of Shares	Registered Name	Date of Valuation	Price/ Share	Total Value	Margin or Pledged (Y/N)
Total					\$	

Schedule C

LIFE INSURANCE					
Insured	Beneficiary	Face Amount	Cash Value	Loans on Policy	Name of Company
		\$	\$	\$	
		\$	\$	\$	
		\$	\$	\$	
		\$	\$	\$	
TOTAL		\$	\$	\$	

Schedule D

REAL ESTATE OWNED						
Property Address	Percent Owned / Type	Value	Monthly Income	Monthly Pymt	Loan Balance	Payable to Whom
	% /	\$				
	% /	\$				
	% /	\$				
	% /	\$				
TOTALS		\$	\$	\$	\$	

Schedule E

OTHER ASSETS & PERSONAL PROPERTY						
Automobiles	Value	RV & Boats	Value	Personal Property	Loan Balance	
Yr: Make:	\$	Yr: Make:	\$	Furniture:	\$	
Yr: Make:	\$	Yr: Make:	\$	Equipment:	\$	
Yr: Make:	\$	Yr: Make:	\$	Jewelry:	\$	
Yr: Make:	\$	Yr: Make:	\$	Other:	\$	
Subtotal		\$	Subtotal	\$	Subtotal	\$

Schedule F

ACCOUNTS, LOANS, AND NOTE PAYABLE TO BANKS AND OTHERS (Include Credit Cards)					
Payable to Whom	Collateral	Name on Acct	Maturity Date	Balance Due	Loan Balance
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
				\$	\$
Total				\$	\$