

# PERSONAL FINANCIAL STATEMENT

Name:		Business Phone:	
Residence Address:		Residence Phone:	
City, State, ZIP:		Other Phone:	
Business Name of Applicant:			
<b>ASSETS</b>		<b>LIABILITIES</b>	
Cash on Hand and In Bank		Accounts Payable	
Savings Accounts		Notes Payable to Banks and Other s (Section 2)	
IRA or Other Retirement Account		Installment Account (Auto) – Monthly Payment \$ _____	
Accounts & Notes Receivable		Installment Account (Other) – Monthly Payment \$ _____	
Life Insurance – Cash Value Only (Section 8)		Loans on Life Insurance	
Stocks & Bonds (Section 3)		Mortgages on Real estate (Section 4)	
Real Estate (Section 4)		Unpaid Taxes (Section 6)	
Automobile(s) – Present Value		Other Liabilities (Section 7)	
Other Personal Property (Section 5)		TOTAL LIABILITIES	
Other Assets (Section 5)		NET WORTH	
TOTAL		TOTAL	
<b>SECTION 1: SOURCES OF INCOME</b>		<b>CONTINGENT LIABILITIES</b>	
Salary		As Endorser or Co-Maker	
Net Investment Income		Legal Claims and Adjustments	
Real Estate Income		Provision of federal Income Tax	
Other Income (Describe below)*		Other Special Debt	
Description of Other Income in Section 1:			
<small>*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted towards total income.</small>			
<b>SECTION 2: NOTES PAYABLE TO BANKS AND OTHERS</b>		<small>(Use attachments if necessary. Each attachment must be identified as a part of this statement and signed).</small>	
Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount

SECTION 3: STOCKS AND BONDS					
Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value
SECTION 4: REAL ESTATE OWNED					
	Property A	Property B		Property C	
Type of Property					
Name & Address of Title Holder					
Date Purchased					
Original Cost					
Present Market Value					
Name & Address of Mortgage Holder					
Mortgage Balance					
Amount of Payment (Month/Year)					
Status of Mortgage					
SECTION 5: OTHER PERSONAL PROPERTY AND OTHER ASSETS					
SECTION 6: UNPAID TAXES					
SECTION 7: OTHER LIABILITIES					
SECTION 8: LIFE INSURANCE HELD			(Face amount, cash surrender value, insurance company and beneficiary)		

Signature:	Date:
Signature:	Date:

**APPLICATION TO LEASE  
FOR PACIFIC COAST COMMERCIAL**

Phone: 619.469.3600  
10721 Treena Street, Suite 200  
San Diego, CA 92131

**ATTENTION:** \_\_\_\_\_

**FAX:** (858) 560-5604

\_\_\_\_\_  
@pacificcoastcommercial.com

The following information must be completed prior to entering into a lease: (Please print or type clearly)

- 1. NAME OF BUSINESS:** \_\_\_\_\_  
State Business is registered in: \_\_\_\_\_  
Current Business Address: \_\_\_\_\_  
\_\_\_\_\_  
Business Website and /or Description: \_\_\_\_\_  
\_\_\_\_\_  
Current Business Landlord Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
# Years at Location: \_\_\_\_\_ # of Employees: \_\_\_\_\_

- 2. FULL DESCRIPTION OF INTENDED USE:** \_\_\_\_\_  
\_\_\_\_\_  
Number of Parking Spaces Needed: \_\_\_\_\_ Any Overnight Parking?: \_\_\_\_\_  
Please list any Hazardous Substances that will be inside the premises and the approximate amounts:  
\_\_\_\_\_  
\_\_\_\_\_

Premises will be a:

a) First time location	<input type="checkbox"/>
b) Expansion of an existing business	<input type="checkbox"/>
c) Relocation of an existing business	<input type="checkbox"/>

- 3. CONTACT INFORMATION:**
- Name of Signor (1): (First, MI, Last) \_\_\_\_\_
- Title: \_\_\_\_\_
- Date of Birth: \_\_\_\_\_
- Driver's License #/State: \_\_\_\_\_
- Social Security Number: \_\_\_\_\_
- Home Address: \_\_\_\_\_  
\_\_\_\_\_
- Telephone: \_\_\_\_\_ Email: \_\_\_\_\_
- Have you filed bankruptcy? Yes \_\_\_\_\_ No \_\_\_\_\_ Convicted of a Felony? Yes \_\_\_\_\_ No \_\_\_\_\_

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If so, where and when? \_\_\_\_\_

Name of Signor (2): (First, MI, Last) \_\_\_\_\_

Title: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Driver's License #/State: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Home Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Have you filed bankruptcy? Yes\_\_\_\_\_ No\_\_\_\_\_

Convicted of a Felony? Yes\_\_\_\_\_ No\_\_\_\_\_

If so, where and when? \_\_\_\_\_

**4. PLEASE PROVIDE THESE DOCUMENTS:**

- Articles of Incorporation or Business License
- 2 years of Business Financial Statement or Individual Tax Returns
- Copy of Most Recent Bank Statement
- If a start-up business, provide a business plan and description of funds available

**5. SIGNATURE:**

I hereby give the above references, MicroBilt/Experian permission to provide financial and credit information, financial or written (via fax or mail), to the owner and or owner Agent (Pacific Coast Commercial) of the property which I am now negotiating to lease. The undersigned hereby waives any privacy of credit information rights or regulations, and agrees to pay a fee as described below to PACIFIC COAST COMMERCIAL for said Credit Report.

**\$15.00 CREDIT PROFILE REPORT per applicant**

**\$50.00 BUSINESS OWNER PROFILE REPORT**

**SIGNOR (1):**

SIGNATURE: \_\_\_\_\_

PRINT NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_

**SIGNOR (2):**

SIGNATURE: \_\_\_\_\_

PRINT NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

DATE: \_\_\_\_\_