

INDIVIDUAL INFORMATION

- 1. Name: \_\_\_\_\_
- 2. Date of birth: \_\_\_\_\_
- 3. Social security number (required for lease): \_\_\_\_\_
- 4. Marital status: \_\_\_\_\_
- 5. Name of spouse: \_\_\_\_\_
- 6. Spouse date of birth: \_\_\_\_\_
- 7. Spouse's social security number: \_\_\_\_\_
- 8. Number of dependents: \_\_\_\_\_

|                  |                         |
|------------------|-------------------------|
| 9. Contact Info: | Direct Phone: _____     |
|                  | Mobil Phone: _____      |
|                  | Fax: _____              |
|                  | Email: _____            |
|                  | Address: _____<br>_____ |

EMPLOYMENT INFORMATION

- 10. Name of employer: \_\_\_\_\_
- 11. Employer's address: \_\_\_\_\_
- 12. Responsibilities: \_\_\_\_\_
- 13. Years with employer: \_\_\_\_\_
- 14. May we contact your employer? \_\_\_\_\_
- 15. A resume is attached (not required): Attached Yes / No \_\_\_\_\_

BUSINESS INFORMATION

- 16. Business legal entity tenant name: \_\_\_\_\_
- 17. Trade name: \_\_\_\_\_
- 18. If a corporation, state of incorporation: \_\_\_\_\_
- 19. Federal ID#: \_\_\_\_\_
- 20. If a corporation, name(s) of individual(s) gauranteeing lease obligations: \_\_\_\_\_  
\_\_\_\_\_
- 21. Address for delivery of documents: \_\_\_\_\_  
\_\_\_\_\_

REFERRALS

- Name, company, phone number: \_\_\_\_\_
- Name, company, phone number: \_\_\_\_\_
- Name, company, phone number: \_\_\_\_\_



CREDIT AUTHORIZATION

*The foregoing statement is true and correct and may continue to be considered at least as favorable as shown until otherwise notified in writing by the undersigned. This application is to acknowledge that during Landlord's consideration of any Lease Agreement, a credit investigation and background report may be done on each individual and/or entity that will be signing the Lease Agreement. Your signature below grants Landlord complete permission to obtain such reports at Landlord's expense.*

*I do hereby grant permission to obtain a credit and/or background report.*

Signed \_\_\_\_\_

Social Security # \_\_\_\_\_

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

Signed \_\_\_\_\_

Social Security # \_\_\_\_\_

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

**\*Please include photos of any existing locations you may own/operate.**



**Personal Financial Statement**

Page 1 of 2

Name \_\_\_\_\_

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

Shopping Center: \_\_\_\_\_

(I, We) make the following statement of all (my, our) assets and liabilities as of the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_, and give other material information for the purpose of obtaining credit with you on notes and bills bearing (my,our) signature endorsement or guarantee and agree to notify you promptly of any change affecting (my, our) ability to pay.

| <b>ASSETS SOLELY OWNED</b><br>(List here only those assets NOT jointly owned)   |  | <b>ALL LIABILITIES AND NET WORTH</b><br>(List here all liabilities joint or otherwise) |  |
|---|--|--|--|
| Cash (See Sched. 1)   |  | Notes Payable to Banks, Unsecured (See Sched 1)  |  |
| U.S. Government Securities  |  | Notes Payable to Banks, Secured (See Sched 1)  |  |
| Listed Stocks and Bonds (See Sched. 4)  |  | Notes Payable to Others, Unsecured   |  |
| Unlisted Stocks and Bonds (See Sched. 4)  |  | Notes Payable to Others, Secured   |  |
| Accounts and Loans Receivable (See Sched. 2)  |  | Loans Against Life Insurance (See Sched. 3)  |  |
| Life Insurance - Cash Value (See Sched. 3)  |  | Mortgages Payable on Real Estate (See Sched 5)   |  |
| Real Estate (See Sched. 5)  |  | Accounts Payable   |  |
| Automobiles   |  | Interest Payable   |  |
| 401K & Money Market Accounts  |  | Estimated Capital Gains Tax  |  |
| Other Assets (Itemize)  |  | Other Taxes and Assessments Payable  |  |
|   |  | Other Liabilities  |  |
|   |  | Total Liabilities  |  |
|   |  | Net Worth (= Assets - Liabilities)   |  |
| <b>TOTAL ASSETS SOLELY OWNED</b>  |  | <b>TOTAL OF ALL LIABILITIES AND NET WORTH</b>  |  |
| <b>JOINTLY OWNED ASSETS</b><br>(Summarize here; Itemize on Sched. 6)  |  | <b>SOURCE OF INCOME</b>  |  |
| Cash (See Sched. 1)   |  | Salary   |  |
| U.S. Government Securities  |  | Bonus and Commissions  |  |
| Listed Stocks and Bonds (See Sched. 4)  |  | Dividends  |  |
| Unlisted Stocks and Bonds (See Sched4)  |  | Real Estate Income   |  |
| Accounts and Loans Receivable (See Sched.2)   |  | Other Income (Itemize):  |  |
| Life Insurance - Cash Value (See Sched 3)   |  |  |  |
| Real Estate (See Sched. 5)  |  | <b>TOTAL INCOME</b>  |  |
| Automobiles   |  |  |  |
| Other Assets (Itemize):   |  |  |  |
| Estimated Household Items Not Included:<br>(Furniture, Jewelry, Electronics - \$50,000 - \$75,000)                                  |  |  |  |
|   |  | <b>PERSONAL INFORMATION</b>  |  |
|   |  | Partner or Officer in any other venture?   |  |
| <b>TOTAL JOINTLY OWNED ASSETS</b>   |  | If yes, please explain.  |  |
| <b>TOTAL OF ALL ASSETS</b>  |  |  |  |
| Have you ever taken bankruptcy, made a composition settlement, or are you a defendent in any legal action? Explain.                 |  |  |  |
| Do you have any contingent liabilities personally or as co-maker, on leases or contracts, or Federal Income Tax Liability? Explain. |  |  |  |
| Do you have a will? And if Yes, who is named as your executor?  |  |  |  |



**Personal Financial Statement**

Page 2 of 2  
Shopping Center:

Name: \_\_\_\_\_  
Trade Name: \_\_\_\_\_  
Shopping Center: \_\_\_\_\_

**No. 1 - Cash (Attach Schedule if necessary)**

| <u>Name of Bank</u> | <u>Type of Acct.</u> | <u>Acct. Number</u> | <u>Last Statement</u> | <u>Cash Balance</u> | <u>Name(s) on Account</u> |
|---------------------|----------------------|---------------------|-----------------------|---------------------|---------------------------|
|                     |                      |                     |                       |                     |                           |
|                     |                      |                     |                       |                     |                           |
|                     |                      |                     |                       |                     |                           |

**No. 2 - Accounts, Loans and Notes Receivable (Attach Schedule if necessary)**

| <u>Name and Address of Debtor</u> | <u>Amount Owed</u> | <u>Age of Debt</u> | <u>Down Payment</u> | <u>Description or Nature of Debt</u> | <u>Description of Security Held</u> |
|-----------------------------------|--------------------|--------------------|---------------------|--------------------------------------|-------------------------------------|
|                                   |                    |                    |                     |                                      |                                     |
|                                   |                    |                    |                     |                                      |                                     |
|                                   |                    |                    |                     |                                      |                                     |

**No.3 - Life Insurance (Attach Schedule if necessary)**

| <u>Owner of Policy</u> | <u>Beneficiary</u> | <u>Insurance Co.</u> | <u>Face Value of Policy</u> | <u>Total Cash Surrender Value</u> | <u>Total Value of Loans on Policy</u> | <u>Policy Assigned</u> |
|------------------------|--------------------|----------------------|-----------------------------|-----------------------------------|---------------------------------------|------------------------|
|                        |                    |                      |                             |                                   |                                       |                        |
|                        |                    |                      |                             |                                   |                                       |                        |
|                        |                    |                      |                             |                                   |                                       |                        |

**No. 4 - Stocks & Bonds (Attach Schedule if necessary)**

| <u>Face Value or # of Shares</u> | <u>Description of Security</u> | <u>Registered in Name of</u> | <u>Original Cost</u> | <u>Present Market Value</u> | <u>To Whom Pledged</u> |
|----------------------------------|--------------------------------|------------------------------|----------------------|-----------------------------|------------------------|
|                                  |                                |                              |                      |                             |                        |
|                                  |                                |                              |                      |                             |                        |
|                                  |                                |                              |                      |                             |                        |

**No. 5 - Real Estate (Attach schedule if necessary)**

| <u>Address</u> | <u>Title in Name of:</u> | <u>Mortgages or Liens</u> | <u>Amount Payments</u> | <u>Original Cost</u> | <u>Present Market Value</u> | <u>Taxes Current</u> |
|----------------|--------------------------|---------------------------|------------------------|----------------------|-----------------------------|----------------------|
|                |                          |                           |                        |                      |                             |                      |
|                |                          |                           |                        |                      |                             |                      |
|                |                          |                           |                        |                      |                             |                      |

**No.6 - Jointly Owned Property - Details of summary on front page. (Attach schedule if necessary)**

| <u>Assets</u> | <u>Value</u> | <u>Name of Joint Tenant</u> |
|---------------|--------------|-----------------------------|
|               | \$           |                             |
|               |              |                             |
|               |              |                             |
|               |              |                             |
|               |              |                             |
|               |              |                             |
|               |              |                             |

