

PERSONAL FINANCIAL STATEMENT

Capital Solutions

LPL Financial Advisor Loan Application

Personal Financial Statement must be completed by every borrower/business owner on the loan application.



Personal Asset & Liability Details

Cash / Savings on Hand & on Deposit

Name of Depository	Balance as of:	Account Type		Market Value
			Total	

Retirement Assets

Description	Balance as of:	Account Type		Market Value
			Total	

Real Estate Owned

	Property 1	Property 2	Property 3	Property 4	Property 5
Type of Property					
Address					
Title Held By:					
Date Purchased					
Date of Last Appraisal					
Estimated Value					
Current Mortgage Balance					
Monthly Mortgage Payment					
LTV Ratio					

Credit Authorization

Pursuant to the federal Fair Credit Reporting Act, I hereby authorize LPL Financial LLC to obtain a CreditReport. I understand that the scope of the credit report may include, but is not limited to, the following areas: verification of Social Security number; current and previous residences; credit history and reports. I understand that, pursuant to the federal Fair Credit Reporting Act, if any adverse action is to be taken based upon the credit report, a copy of the report and a summary of the consumer's rights will be provided to me.

Full Name: _____

Signature: _____

Address _____

State: _____ Zip Code: _____

City: _____

Date: _____

Date of Birth: _____

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Personal / Business Debt Schedule

Date: _____

Full Name: _____

Company Name: _____

Please disclose all personal and business debt to ensure the underwriting process is efficient.

Debt includes: alimony, child support, joint accounts, mortgages, personal debt, credit cards, lines of credit, leases, car loans, past liens or judgements, IRS tax payments, etc.

Personal Debt Obligations

Creditor / Lender	Origination Date	Original Amount	Outstanding Balance	Interest Rate	Monthly Payment	Maturity Date	Collateral

Business Debt Obligations

Creditor / Lender	Origination Date	Original Amount	Outstanding Balance	Interest Rate %	Monthly Payment	Maturity Date	Collateral

I certify that, to the best of my knowledge and belief, that the information provided here are true, complete, and accurate.

Signature: _____