SURETY ONE, INC.

Personal Financial Statement

Estado Financiero Personal · Ed. 11/2026

P.O. Box 37284, Raleigh, NC 27627 · (919) 859-5294 · Fax (919) 834-7039
P.O. Box 16451, San Juan, PR 00908 · (787) 333-0222 · Fax (787) 293-9221
(800) 373-2804 · Underwriting@SuretyOne.com · www.SuretyOne.com

PERSONAL FINANCIAL STATEMENT AS OF _____

Name of Individual	Social Security No.	Age
Spouse's Name	Social Security No.	Age
Residence Address	Occupation	

ASSETS	*	COST BASIS	MARKET VALUE BASIS	LIABILITIES	*	TOTAL AMOUNT	MONTHLY PAYMENTS
Cash in Bank	1			Loans Payable – Bank	7		
Notes Receivable	2			Notes Payable	8		
Accounts Receivable	2			Accounts Payable	8		
Government Bonds / Marketable Securities	3			Taxes Payable	9		
Real Estate – Homestead	4			Mortgages Payable	4		
Real Estate – Investments	4			Other Liabilities	10		
Cash Value of Life Insurance	5						
Other Assets	6			**TOTAL LIABILITIES**			
Car – Household Furnishings				****NET WORTH**			****Assets (Cash Basis) – Liabilities Net Worth**
TOTAL ASSETS				**TOTAL LIABILITIES AND NET WORTH**			

INCOME					TOTAL INCOME
	Salary		Real Estate Income		
	Bonus / Commission		Other		

*SUPPLEMENTARY SCHEDULES

NOTE: All data listed above must appear on the appropriate schedules. Insert "none" where appropriate. Designate if owned jointly.

1. CASH IN BANK

Name, Branch and Location of Bank	Account Number	Amount

2. NOTES AND ACCOUNTS RECEIVABLE

Name and Address of Debtor	Amount	Due Date	Security	Pledged To Whom

3. BONDS AND MARKETABLE SECURITIES

Name of Security	Exchange Listed	No. of Shares	Price Per Share	Total Market Value

4. REAL ESTATE

Location / Description	Year Acq'd	Cost	Market Value	Monthly Income	Monthly Payment	Mortgage Balance	Mortgage or Lien Holder

5. CASH VALUE OF LIFE INSURANCE

Name and Address of Company	Beneficiary	Face Value	Cash Value	Amount of Loans Against Policy

6. OTHER ASSETS

Description	Title Holder	Cost	Market Value	Age of Assets

7. LOANS PAYABLE

Name of Lender	Address	Balance Due	Amount Due in One Year	How Secured?

8. ACCOUNTS AND NOTES PAYABLE (Including Charge Accounts)

Payable To Whom	Address	Amount	Date Payment Is Due	How Secured?

9. TAXES PAYABLE (State and Federal)

Description	Amount	Date Payment Is Due

10. OTHER

Location / Description	Payable To Whom	Amount	Date Payment Is Due	How Secured?

Are you contingently liable or endorser on any bonds or other obligation? ☐ Yes* ☐ No
Are you involved in any litigation? ☐ Yes* ☐ No
Have you filed for bankruptcy in the last 7 years? ☐ Yes* ☐ No

*Explain all YES answers on a separate sheet of paper

I hereby certify and declare that the above statement presents accurately my financial condition to the best of my knowledge and belief, and I hereby authorize and request any person, firm or corporation to furnish any information requested by SURETY ONE, for itself and its affiliates, parents and subsidiaries, individually and collectively (hereinafter referred to as the "Surety"), concerning any transaction with the undersigned; and the said Surety is authorized to obtain information to confirm this financial statement and may furnish copies of the foregoing statement, and any information which it now has or may hereafter obtain, to other companies for the purpose of securing reinsurance or co-suretyship.

NOTICE TO CALIFORNIA RESIDENTS — CONSUMER CREDIT REPORT

In connection with this application, and during the term of any bond, renewal or claim, the Surety may request and use one or more consumer credit reports about you obtained from a consumer credit reporting agency. Under the California Consumer Credit Reporting Agencies Act (California Civil Code § 1785.1 et seq.), if adverse action is taken based in whole or in part on information contained in such a report, you will receive written notice of the name, address and telephone number of the agency that furnished it, and you will have the right to obtain a free copy of your report from that agency within 60 days and to dispute the accuracy or completeness of any information in it.

☐ Check this box if you wish to receive a copy of any consumer credit report obtained about you. Initials: _____ _____

_____ _____
Signature Date

_____ _____
Signature Date