



## PERSONAL FINANCIAL STATEMENT

HAWAII GREEN INFRASTRUCTURE AUTHORITY (HGIA)

As of \_\_\_\_\_, \_\_\_\_\_

Complete this form for: (1) each proprietor, or (2) each general partner, or (3) each individual with 20% or greater ownership interest (excluding limited partners), or (4) any person or entity providing a guaranty on the loan. For entities, please provide company financial statements and tax returns.

Name	Business Phone
Residence Address	Residence Phone
City, State, & Zip Code	
Business Name of Applicant/Borrower	

ASSETS	(Omit Cents)	LIABILITIES	(Omit Cents)
Cash on hand & in Banks .....	\$ .....	Accounts Payable .....	\$ .....
Savings Accounts .....	\$ .....	Notes Payable to Banks and Others .....	\$ .....
IRA or Other Retirement Account .....	\$ .....	(Describe in Section 2)	
Accounts & Notes Receivable .....	\$ .....	Installment Account (Auto) .....	\$ .....
Life Insurance-Cash Surrender Value Only .....	\$ .....	Mo. Payments \$ .....	
(Complete Section 8)		Installment Account (Other) .....	\$ .....
Stocks and Bonds .....	\$ .....	Mo. Payments \$ .....	
(Describe in Section 3)		Loan on Life Insurance .....	\$ .....
Real Estate .....	\$ .....	Mortgages on Real Estate .....	\$ .....
(Describe in Section 4)		(Describe in Section 4)	
Automobile-Present Value .....	\$ .....	Unpaid Taxes .....	\$ .....
Other Personal Property .....	\$ .....	(Describe in Section 6)	
(Describe in Section 5)		Other Liabilities .....	\$ .....
Other Assets .....	\$ .....	(Describe in Section 7)	
(Describe in Section 5)		Total Liabilities .....	\$ .....
		Net Worth .....	\$ .....
<b>Total</b>	\$ .....	<b>Total</b>	\$ .....

Section 1. Source of Income	Contingent Liabilities
Salary .....	As Endorser or Co-Maker .....
Net Investment Income .....	Legal Claims & Judgments .....
Real Estate Income .....	Provision for Federal Income Tax .....
Other Income (Describe below)* .....	Other Special Debt .....

Description of Other Income in Section 1.


\*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

Section 2. Notes Payable to Banks and Others. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral

Section 3. Stocks and Bonds. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed).					
Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

Section 4. Real Estate Owned. (List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)			
	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

Section 5. Other Personal Property and Other Assets. (Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and if delinquent, describe delinquency)

Section 6. Unpaid Taxes. (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

Section 7. Other Liabilities. (Describe in detail.)

Section 8. Life Insurance Held. (Give face amount and cash surrender value of policies - name of insurance company and beneficiaries)

I/We authorize HGIA/Lender to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I/We certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I/We authorize HGIA both now and in the future, to obtain consumer credit reports in my/our name(s) as individuals and to provide credit bureaus and others with information about HGIA's experience with me/us and the Applicant Business.

Signature:	Date:	Social Security Number:
Signature:	Date:	Social Security Number:

Are any of your property held in Trust? ☐ Yes ☐ No. If yes, please provide Long-Form Trust Documents.