## RESUME OF KEY EMPLOYEE

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Full Name: |  | | | | | | | | | |  | | | | | | | | | |  | | | | Date: | | |  |
| Last | | | | | | | | | | | First | | | | | | | | | | M.I. | | | | | | | |
| Address: |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | |
| Street Address | | | | | | | | | | | | | | | | | | | | | Apartment/Unit # | | | | | | | |
|  |  | | | | | | | | | | | | | | | | | | | |  | | | | | |  | |
|  | | | | | | | | | | | | | | | | | | | | |  | | | | | | ZIP Code | |
| Phone: | (     )       Position: | | | | | | | | | | | E-mail Address: | | | | | | | | |  | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Education | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| High School: | |  | | | | | | | | | City/St: | | |  | | | | | | | | | | | | | | |
| From: |  | | | To: | |  | | Graduate? | | | | | | YES | NO | | | | | | Degree: | | |  | | | | |
| College: |  | | | | | | | | | | City/St: | | |  | | | | | | | | | | | | | | |
| From: |  | | | To: | |  | | Graduate? | | | | | | YES | NO | | | | | | Degree: | | |  | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| References | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Please list references. | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Name: |  | | | | | | | | | | | | Relationship: | | | | |  | | | | | | | | | | |
| Company: |  | | | | | | | | | | | | | | | | | | | Phone: | | | (     ) | | | | | |
|  |  | | | | | | | | | | | |  | | | | |  | | | | | | | | | | |
| Name: |  | | | | | | | | | | | | Relationship: | | | | |  | | | | | | | | | | |
| Company: |  | | | | | | | | | | | | | | | | | | Phone: | | | | (     ) | | | | | |
|  |  | | | | | | | | | | | |  | | | | |  | | | | | | | | | | |
| Previous Employment | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Company: |  | | | | | | | | | | | | | | | |  | | | | | | |  | | | | |
| Job Title: |  | | | | | | | | |  | | | | | |  | | | | | |  | | | | | |  |
| Responsibilities: | | |  | | | | | | | | | | | | | | | | | | | | | | | | | |
| From: |  | | | | To: | |  | | Reason for Leaving: | | | | | | |  | | | | | | | | | | | | |
| Company: |  | | | | | | | | | | | | | | | |  | | | | | | |  | | | | |
| Job Title: |  | | | | | | | | |  | | | | | |  | | | | | |  | | | | | |  |
| Responsibilities: | | |  | | | | | | | | | | | | | | | | | | | | | | | | | |
| From: |  | | | | To: | |  | | Reason for Leaving: | | | | | | |  | | | | | | | | | | | | |
|  |  | | | | | | | | | | | | | | | |  | | | | | | |  | | | | |
| Company: |  | | | | | | | | | | | | | | | |  | | | | | | |  | | | | |
| Address: |  | | | | | | | | | | | | | | | |  | | | | | |  | | | | | |
| Responsibilities: | | |  | | | | | | | | | | | | | | | | | | | | | | | | | |
| From: |  | | | | To: | |  | | Reason for Leaving: | | | | | | |  | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Disclaimer and Signature | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| I certify that my answers are true and complete to the best of my knowledge. | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Signature: |  | | | | | | | | | | | | | | | | | | | | | | Date: | | |  | | |

**PERSONAL FIANCIAL STATEMENT**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS: \_\_\_\_\_\_\_ - \_\_\_\_\_\_\_ - \_\_\_\_\_\_\_ DOB \_\_\_ / \_\_\_ / \_\_\_

Spouse: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS: \_\_\_\_\_\_\_ - \_\_\_\_\_\_\_ - \_\_\_\_\_\_\_ DOB \_\_\_ / \_\_\_ / \_\_\_

Residence Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_ Zip: \_\_\_\_\_\_\_\_

The following is submitted for the purpose of procuring, establishing and maintaining credit with you on behalf of the undersigned or person, firms or corporations in whose behalf the undersigned may either severally or jointly with others execute a guaranty in your favor. The undersigned warrants that this financial statement is true and correct and that you may consider this statement as continuing to be true and correct until a written notice of change is given to you by the undersigned.

***PLEASE DO NOT LEAVE ANY QUESTIONS UNANSWERED***

|  |  |  |  |
| --- | --- | --- | --- |
| Liabilities | ***In Even Dollars*** | | |
| Notes Payable to Bank – secured |  |  |  |
| Notes Payable to banks – unsecured |  |  |  |
| Due to brokers |  |  |  |
| Amounts payable to others – secured |  |  |  |
| Amount payable to others – unsecured |  |  |  |
| Accounts and bills due |  |  |  |
| Unpaid Income Tax |  |  |  |
| Other unpaid taxes and interest |  |  |  |
| Real estate mortgages payable- see Schedule B |  |  |  |
| Other debts – itemize |  |  |  |
|  |  |  |  |
| ***Total Liabilities*** |  |  |  |
| ***Net Worth*** |  |  |  |
| ***Total Liability and Net Worth*** |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Assets | ***In Even Dollars*** | | |
| Cash on hand and in banks |  |  |  |
| Marketable Securities – see Schedule E |  |  |  |
| Non-Marketable Securities – see Schedule E |  |  |  |
| Securities held by broker in margin accounts |  |  |  |
| Restricted or controlled stocks |  |  |  |
| Partial Interest in Real Estate -see Schedule D |  |  |  |
| Real Estate Owned – See Schedule C |  |  |  |
| Loans Receivable |  |  |  |
| Automobiles and other personal property |  |  |  |
| Cash Value – life insurance – see Schedule B |  |  |  |
| Other Assets – itemize: |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| ***Total Assets*** |  |  |  |

Completed as of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_\_ ***Income taxes settled through what date?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

|  |  |  |  |
| --- | --- | --- | --- |
| Annual Sources of Income | | Personal Information | |
| Salary, bonus & commissions | $ | Do you have a will?  If yes, name of executor. | |
| Dividends | $ |
| Real Estate Income | $ | Are you a partner or officer in any other venture? | |
| Other Income | $ |
|  | $ | Married Single | Age |
|  | $ | Minor children : | |
| Total | $ | Other Dependents : | |
| Contingent Liabilities | | General Information | |
| Do you have any contingent Liabilities?  ***If yes give details:*** | | ***Are any assets pledged?*** | |
| ***Are you a defendant in any suits or legal actions?*** | |
| ***As endorser, co-maker or guarantor*** | ***$*** |
| ***On leases or contracts*** | ***$*** | ***Personal Bank accounts carried at:*** | |
| ***Legal claims*** | ***$*** |
| ***Other special debt*** | ***$*** | ***Have you ever taken bankruptcy? Explain:*** | |
| ***Amount of contested income tax liens*** | ***$*** | ***Have any companies you were an officer of or partner in ever failed or taken bankruptcy? \_\_\_\_\_ Please explain on a separate sheet of paper.*** | |

#### SCHEDULE A – U.S. GOVERNMENTS AND MARKETABLE SECURITIES

|  |  |  |  |
| --- | --- | --- | --- |
| No of Shares or Face Value (Stocks/mutual funds/Bonds) | Description | In Name Of | Market Value |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

SCHEDULE B – LIFE INSURANCE CARRIED, INCL. GROUP INSURANCE

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Face Amount | Name of Company | Beneficiary | Cash Surrender Value | Loans |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

SCHEDULE C – REAL ESTATE OWNED

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Description Of Property and Improvements | Date Acquired | Title in Name of | Cost | Market Value | Mortgage | |
| Amount | Maturity |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

SCHEDULE D – PARTIAL INTERESTS IN REAL ESTATE EQUITIES

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Location of Property | % of Ownership | Type | Yr. Of Purchase | Cost ( C ) of Market ( M ) | Mortgage | Value of Equity |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

SCHEDULE E – NON-MARKETABLE SECURITIES

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Description of Securities | No. of Shares Owned | Dated: | Book Value Per Financial Statement | No of Shares Outstanding | Total Value |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

SCHEDULE F – NAMES OF BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Date | High Credit | Owe Currently | Secured or Unsecured |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

The undersigned certifies that both sides hereof and the information inserted therein has been carefully read and is true, correct and complete. In addition the surety companies that TIS Insurance Services represents are hereby authorized to request from any credit reporting agency any information that they may feel necessary in the course of their investigation.

Principal Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: ­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_