Preservation North Carolina

The Historic Preservation Foundation of North Carolina, Inc.

Preservation North Carolina
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This Personal Financial Statement is provided to The Historic Preservation Foundation of North Carolina, Inc. (dba Preservation North Carolina) along with an Offer to Purchase and Contract for the endangered historic property available through Preservation North Carolina's Endangered Properties Program, for the sole purpose of demonstrating the financial capacity for the undersigned to take on the purchase and rehabilitation of that endangered historic property. **This statement is not an application for credit** and will only be used as a guide in determining the ability of the undersigned to successfully purchase and rehabilitate the endangered historic property for which this statement is being provided. The personal information contained herein shall only be shared with persons who are directly involved with Preservation North Carolina's Endangered Properties Program, or the real estate broker(s) hired by Preservation North Carolina, and shall be securely discarded (shredded) by Preservation North Carolina should the offer made by the buyer(s) not be accepted.

Personal Financial Statement

Buyer Name(s): ______________________

Property Name/Address:	*Estimated Rehab Cost:* $

Assets	**Amount in Dollars (rounded)**
Cash - checking accounts	$
Cash - saving accounts	$
Certificates of deposit	$
Securities - stocks / bonds / mutual funds	$
Notes and contracts receivable	$
Life insurance *(cash surrender value)*	$
Personal property *(autos, jewelry, etc.)*	$
Retirement Funds *(eg IRAs, 401k)*	$
Real Estate *(market value)*	$
Other asssets *(specify)*	$
Total Assets	$

Liabilities	**Amount in Dollars (rounded)**
Current Debt *(credit cards, car loans, accounts)*	$
Notes payable *(describe below)*	$
Taxes payable	$
Real estate mortgages *(describe below)*	$
Other liabilities *(specify)*	$
Total Liabilities	$

Net Worth *(Total Assets Minus Total Liabilities)*	$
Monthly Net Income *(Gross Income Minus Monthly Expenses)*	$
If Buyer will be acquiring a loan, will it be used for the purchase and rehabilitation or just rehabilitation of the property?	

Notes/descriptions:

Signature(s): ______________________ Date: ____________

______________________ ____________