

PERSONAL FINANCIAL STATEMENT

Please Use Only this Required City of Tulsa Personal Financial Statement (PFS) Form is Available Upon Request – it can be sent to via Email/Fax/U.S. Mail or locate it online <http://www.cityoftulsa.org/Community/HumanRights>

Use only Personal Information when completing the form

Date should be the date the form was completed.

Assets/Liabilities: All information provided in the asset and liabilities columns must be of personal nature. List **business equity** in Other Personal Property in this section and provide a copy of your business balance sheet with the PFS.

The real estate section in the asset column is for personal property that you own and use for renting, vacationing, etc. Personal residence information should be listed in Section 4. Real Estate Owned.

Section 1. Source of Income include, the salary received from your business, personal investment income that you receive, draws from the business's funds, or payment from other employment etc.

Section 2. Notes Payable to Banks and Others include, all loans taken out for personal use, i.e., autos, credit cards, vacation, etc.

Section 3. Stocks and Bonds: List only stock traded on the stock market.

Section 4. Real Estate Owned: Property A is your primary home/residence where you occupy at least 72 hours of the week. Property B and C should include other Real Estate that you own. Attach additional sheets to describe type, address, purchase date, original cost, present value and mortgage balance of other properties.

Sections 5-8: Provide a description of asset and liabilities in this section of the statement.

All businesses certified with the City of Tulsa must be determined as; 1) a small business concern, 2) and economically disadvantaged as defined by the Small Business Administration.

PFS Form Must Be Completed by Applicants

(Assets <less> Liabilities = unadjusted net worth). It is imperative that information that would calculate the equity in your personal residence and your business is represented in these sections.