



Personal Financial Statement

I may apply for a credit extension, loan, or other financial accommodation alone or together with someone else, (“co-application”). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this required statement and any supporting schedules jointly. Otherwise, separate forms and schedules are required.

I am/we are applying for:

- INDIVIDUAL CREDIT – relying solely on my income or assets
- INDIVIDUAL CREDIT – relying on my income or assets as well as income or assets from other sources
- JOINT CREDIT – We intend to apply for joint credit (initials) _____

APPLICANT

Name _____ Social Security Number _____

Address _____

Telephone Number _____ Date of Birth _____

Present Employer _____ Position _____

Address _____

Business Phone _____ Loan Purpose _____

CO-APPLICANT

Name _____ Social Security Number _____

Address _____

Telephone Number _____ Date of Birth _____

Present Employer _____ Position _____

Address _____

Business Phone _____ Loan Purpose _____

Date of Valuation _____		• Round all amount to the nearest \$100 • Attach separate sheet if you need more space to complete	
schedules			
Assets (assets you own)	Amount	Liabilities (debts you owe)	Amount
Cash in this bank: Checking		Loans payable to banks (schedule 7)	
Savings		Loans payable to others (schedule 7)	
C.D.'s		Installment contracts payable	
IRA/Keogh/Pension		Amts due to dept. stores & other	
Cash in other banks		Credit cards (MasterCard, Visa)	
Due from friends, relatives, and others (schedule 1)		Income taxes payable	
Mortgage and contract for deeds owned (schedule 2)		Other taxes payable	
Securities owned (schedule 3)			
Cash surrender value of life insurance (schedule 4)		Loans on life insurance (schedule 4)	
Homestead (schedule 5)			
Other real estate owned (schedule 5)		Mortgage on homestead (schedule 6)	
Automobiles (year, make, model)		Mortgage or liens on other real estate owned (schedule 6)	
Personal Property			
		Contracts for deed (schedule 6)	
		Other liabilities (detail)	
Other assets (detail)			
		TOTAL LIABILITIES	
TOTAL ASSETS		NET WORTH (assets - liabilities)	

Annual Income	Applicant	Co- Applicant	Contingent liabilities	Amount
Salary			As endorser	
Commissions			As guarantor	
Dividends			Lawsuits	
Interest			For taxes	
Rentals			Other (detail)	
Alimony, child support or maintenance (you need not show this unless you wish us to consider it).				
Other				
			<input type="checkbox"/> Check here if "none"	
Total Income			Total Contingent Liabilities	

Schedule 1 Due from Friends, Relatives and Others

Name of Debtor	Owed to	Collateral	How payable	Maturity date	Unpaid Balance
			\$ per		
			\$ per		
			\$ per		
			\$ per		
Total					

Schedule 2 Mortgage and Contracts for Deed Owned

Name of Debtor	Type of property	1 st or 2 nd lien	Owed to	How payable	Unpaid Balance
				\$ per	
				\$ per	
				\$ per	
				\$ per	
Total					

Schedule 3 Securities Owned

No. shares or Bond Amount	Description	In whose name(s) registered	Cost			Present Market Value			Listed Unlisted
Total									

Schedule 4 Life Insurance

Insured	Insurance Company	Beneficiary	Face value of policy			Cash value			Loans		
Total											

Schedule 5 Real Estate

Address and type of property	Title in name(s) of	Monthly Income	Cost Year Acquired		Present Market Value			Amount of Insurance		
			\$	Year						
			\$							
			Year							
			\$							
			Year							
			\$							
			Year							
			\$							
			Year							
			\$							
			Year							

Schedule 6 Mortgages or Liens on Real Estate

To whom payable	How Payable		Interest Rate	Maturity Date	Unpaid Balance		
	\$	Per					
	\$	Per					
	\$	Per					
	\$	Per					
	\$	Per					
	\$	Per					

Schedule 7 Loans Payable to Banks & Others and Installment Contract Payable

To whom payable	Address	Collateral or Unsecured	How Payable		Maturity Date	Unpaid Balance		
			\$	Per				
			\$	Per				
			\$	Per				
			\$	Per				
			\$	Per				
			\$	Per				

	Applicant	Co- Applicant
Have I ever gone through bankruptcy or had a judgment against me?	____ Yes ____ No	____ Yes ____ No
Are any assets pledged or debts secured except as shown?	____ Yes ____ No	____ Yes ____ No
Have I made a will?	____ Yes ____ No	____ Yes ____ No
Number of dependents (if none, X "None")	____ ____ None	____ ____ None
Marital status (answer only if this financial statement is provided in connection with a request for secured credit or applicant is seeking a joint account with spouse.)	____ Married	____ Married
	____ Separated	____ Separated
	____ Unmarried	____ Unmarried

(Unmarried includes single, divorced, widowed)

The information contained in this statement and supporting schedules is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guaranty of the undersigned. The undersigned acknowledges and understands that you are relying upon the information provided herein in deciding to grant or continue credit or to accept a guaranty thereof. The undersigned represents, warrants, and certifies that the information provided herein is true, correct, and complete to the best of the undersigned's knowledge. The undersigned agrees to notify you immediately and in writing of any changes in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of the undersigned or (3) in the ability of the undersigned to perform its obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein, and to determine the creditworthiness of the undersigned. The undersigned authorizes you to answer questions about your credit experience with the undersigned. You are authorized to check the undersigned's credit and employment history, or any other information contained herein.

THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.

Date

My signature

Date

Co-applicant signature (if you are requesting the financial accommodation jointly)