

PERSONAL FINANCIAL STATEMENT

IMPORTANT

Read These Directions Before Completing This Statement And Check Applicable Boxes

- If you are applying for individual credit in your own name and are relying on your own income or assets and not the income or assets of another person as the basis for repayment of the credit request, complete entire form except Section 2 and 5.
- If you are applying for joint credit with another person, complete all Sections providing information in Section 2 about the joint applicant.
- If joint applicant(s) income and financial condition are not reported on this form in Sections 3 and 5, etc., they should complete a separate Personal Financial Statement.
- If you are applying for individual credit, but are relying on income from alimony, child support, separate maintenance, or the income of another person as a basis for repayment of the credit request, complete ALL Sections, providing information in Section 2 and 5 about the person whose alimony, support, or maintenance payments or income or assets you are relying on.
- If this statement related to your guaranty of the indebtedness of other person(s), firm(s), or corporation(s) complete entire form except Sections 2 and 5.

SECTION 1 • APPLICANT INFORMATION (Type or Print)		SECTION 2 • JOINT APPLICANT OR OTHER PARTY INFORMATION	
Name		Name	
Residence Address		Residence Address	
City, State & Zip		City, State & Zip	
Position or Occupation		Position or Occupation	
Business Name		Business Name	
Business Address		Business Address	
City, State & Zip		City, State & Zip	
Res. Phone	Bus. Phone	Res. Phone	Bus. Phone
Nearest Relative Not living with Me	Relationship		
Address	Phone		
SECTION 3 • STATEMENT OF FINANCIAL CONDITION AS OF _____, 19____			
Assets (Do not include Assets of doubtful value)		Liabilities	
In Dollars (Omit Cents)		In Dollars (Omit Cents)	
Cash on hand and in banks - List on Sched. F.	\$	Notes payable to Financial Institutions - List on Schedule F	\$
Securities - List on Schedule A	\$	Accounts and bills due - Schedule B	\$
Securities held by broker in margin accounts	\$	Unpaid income tax	\$
Restricted or control stocks	\$	Other unpaid taxes and interest	\$
Accounts, Loans and Notes Receivable - List on Schedule C	\$	Real estate mortgages payable - List on Sched. D	\$
Real Estate Owned - List on Schedule D	\$	Other debts - itemize by Lender Name	\$
Automobiles and other personal property List on Schedule G	\$		\$
Cash value life insurance - List on Schedule E	\$		\$
Other assets - itemize	\$		\$
	\$		\$
	\$	TOTAL LIABILITIES	\$
	\$	NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITY AND NET WORTH	\$
SECTION 4 • APPLICANT INCOME AND RELATED INFORMATION for year ended _____, 19____		SECTION 5 • If Section 2 is completed, provide income and related information on Joint Applicant or other party for year ended _____, 19____	
Salary	\$	Salary, Bonuses & commissions	\$
Dividends / Interest	\$	Dividends / Interest	\$
Real estate income	\$	Real estate income	\$
Other income (Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation)	\$	Other income (Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation)	\$
TOTAL	\$	TOTAL	\$
CONTINGENT LIABILITIES			
As Endorser, co-maker or guarantor?	\$	Other special debt	\$
On leases or contracts?	\$	Amount of contested income tax liens	\$
Legal claims	\$	Other (describe)	\$
ESTIMATE OF ANNUAL EXPENSES			
Income Taxes	\$	Rent Payable	\$
Other Taxes	\$	Other Expenses	\$
Insurance Premiums	\$	TOTAL	\$
Mortgage Payments	\$		
PERSONAL INFORMATION			
Do you have a will? If so, name of executor		No. of dependents	
Are you a partner or officer in any other venture? If so, describe		Income tax settled through (date)	
Are you obligated to pay alimony, child support or separate maintenance payments? If so, describe			
Have you ever been declared bankrupt? In the last 10 years? If so, explain			

(FORM CONTINUED ON REVERSE SIDE)

SCHEDULE A - SECURITIES

Number of Shares or Face Value (Bonds)	Description	In Name Of	Are These Pledged	Market Value
Total			\$	

SCHEDULE B - ACCOUNTS & BILLS DUE

Account #	Creditor	In Name of	Mo. Pmt.	Balance
Totals			\$	\$

SCHEDULE C - ACCOUNTS, LOANS AND NOTES RECEIVABLE (Indicate by a ✓ If Others Have Ownership Interest)

Name of Debtor	✓	Amount Owing	Age of Debt	Purpose of Borrowing	Description of Security Held	Date payment Expected
Total	\$					

SCHEDULE D - REAL ESTATE OWNED (Indicate by a ✓ If Others Have Ownership Interest)

Address & Type Of Property	✓	Mortgagor	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Balance	Mo. Pmt.
Totals						\$	\$	\$

SCHEDULE E - LIFE INSURANCE CARRIED, INCLUDING GROUP INSURANCE

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value
Totals				\$	\$

SCHEDULE F - CASH IN BANKS AND LOANS DUE TO FINANCIAL INSTITUTIONS

Name of Institution	Account #	Type of Ownership	On Deposit	Amount Owing on Loan/Credit Accts.	Max. Credit Line	Mo. Pmt.	Collateral (If Any) & Type of Ownership
			\$	\$			
Cash on Hand			\$				
Total Due				\$			

SCHEDULE G - AUTOMOBILES AND OTHER PERSONAL PROPERTY (Indicate by a ✓ If Others Have Ownership Interest)

DESCRIPTION	✓	Date When New	Cost When New	Value Today	LOANS ON PROPERTY	
					Balance Due	To Whom Payable
Automobiles			\$	\$	\$	
Total				\$		

Other or continued pertinent information you wish to provide:

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each of the undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete 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. The undersigned also agrees to notify you immediately in writing of any significant adverse change in such financial condition. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my / our creditworthiness. You are authorized to answer questions about your credit experience with me/us. I understand that you will retain this application whether or not it is approved.

Signature (Individual) _____ Signature (Other Party) _____
 S.S. No. _____ Date of Birth _____ S.S. No. _____ Date of Birth _____
 Date Signed _____ Date Signed _____