



**PERSONAL FINANCIAL STATEMENT**

As of \_\_\_\_\_, \_\_\_\_\_

Name: (Last, First, Middle)

Birthdate: \_\_\_\_\_ Social Security No.: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Residence Address: \_\_\_\_\_ Residence Phone: \_\_\_\_\_

City, State, & Zip Code \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Joint Applicant's Name: (Last, First, Middle)

Birthdate: \_\_\_\_\_ Social Security No.: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Business Name of Applicant/Borrower

ASSETS (Omit Cents)		LIABILITIES (Omit Cents)	
Cash on hand & In Banks	\$ _____	Accounts Payable	\$ _____
Savings Accounts (Including CDs)	\$ _____	Notes Payable to Banks and Others	\$ _____
IRA or Other Retirement Account(s)	\$ _____	(Describe in Section 2)	
Accounts & Notes Receivable	\$ _____	Loan on Life Insurance	\$ _____
Life Insurance-Cash Surrender Value Only	\$ _____	Mortgages on Real Estate	\$ _____
(Complete Section 8)		(Describe in Section 4)	
Stocks and Bonds	\$ _____	Unpaid Taxes	\$ _____
(Describe in Section 3)		(Describe in Section 6)	
Real Estate	\$ _____	Other Liabilities	\$ _____
(Describe in Section 4)		(Describe in Section 7)	
Automobile-Present Value	\$ _____	Total Liabilities	\$ _____
Other Personal Property	\$ _____	Net Worth	\$ _____
(Describe in Section 5)			
Other Assets	\$ _____		
(Describe in Section 5)			
<b>Total</b>	<b>\$ _____</b>	<b>Total</b>	<b>\$ _____</b>

Source of Income	Contingent Liabilities
Salary	As Endorser or Co-Maker
Net Investment Income	Legal Claims & Judgments
Real Estate Income	Provision for Federal Income Tax
Other Income (Section 1)*	Other Special Debt

**Section 1. Description of Other Income.**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

**Section 2. Notes Payable to Banks and Others.** (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Collateral

<b>Section 3. Stocks and Bonds</b> (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)					
Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

**Section 4. Real Estate Owned** (List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

**Section 5. Other Personal Property and Other Assets** (Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment and if delinquent, describe delinquency.)

Description of Other Personal Property and/or Other Assets.	Value

**Section 6. Unpaid Taxes** (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

Description of Unpaid Taxes.	Value

**Section 7. Other Liabilities** (Describe in detail.)

Description of Other Liabilities.	Value

**Section 8. Life Insurance Held** (Give face amount and cash surrender value of policies - name of insurance company and beneficiaries.)

Description of Life Insurance Held.	Value

**SIGNATURES** I certify that everything I have stated in this application and on any attachments is correct. Lender may keep this application whether or not it is approved. By signing below I authorize Lender to check my credit and employment history and to answer questions others may ask Lender about my credit record with Lender. I understand that I must update credit information at Lender's request if my financial condition changes.

We are applying for joint credit. Initials \_\_\_\_\_

\_\_\_\_\_  
Applicant's Signature Date Other Signature (Where Applicable) Date