



Personal Financial Statement

As of _____, 20__

Complete this form for (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each stockholder owning 20% or more of voting stock and each corporate officer or director, or (4) any other person or entity providing a guaranty on the loan.

Name	Business Phone ()
Residence Address	Residence Phone ()
City, State & Zip Code	
Business Name of Applicant/Borrower	

ASSETS (Omit Cents)		LIABILITIES (Omit Cents)	
Cash on Hand & in Banks/Credit Unions	\$	Accounts Payable	\$
Savings Accounts	\$	Notes Payable to Banks and Others	\$
IRA or Other Retirement Account	\$	Installment Account (Auto) Mo.	
Accounts & Notes Receivables	\$	Payments \$ _____	\$
Life Insurance - Cash Surrender Value Only	\$	Installment Account (Other) Mo.	
Stocks & Bonds (complete Section 3)	\$	Payments \$ _____	\$
Real Estate (complete Section 4)	\$	Loan on Life Insurance	\$
Automobile - Present Value	\$	Mortgages on Real Estate	\$
Other Assets (complete Section 5)	\$	Unpaid Taxes	\$
	\$	Other Liabilities	\$
	\$	Total Liabilities	\$ -
	\$	Net Worth	\$ -
TOTAL	\$ -	TOTAL	\$ -

Section 1. Source of Income		Contingent Liabilities	
Salary	\$	As Endorser or Co-Maker	\$
Net Investment Income	\$	Legal Claims & Judgements	
Real Estate Income	\$	Provisions for Federal Income Tax	\$
Other Income (Describe Below)*	\$	Other Special Debt	\$
TOTAL	\$ -	TOTAL	\$ -

Description of Other Income in Section 1.

*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/Credit Unions and Others. (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)					
Name and Address of Note Holder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc)	How Secured or Endorsed Type of Collateral

Section 3. Stocks and Bonds. (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 attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Name & Address of Title Holder			
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 pledged as security, state name and address of lien holder, amount of lien, terms of payment, and if delinquent, describe delinquency.)

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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.)

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

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

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The above financial and supporting schedules, which are submitted for the purpose of establishing, obtaining and maintaining credit, present a true, complete and correct statement of my financial condition as of the date shown. I agree to notify the credit union of any material adverse change in my financial condition; and to furnish current financial information upon request by the credit union from time to time. The credit union is authorized to contact any appropriate third parties for the purpose of verifying any information at any time furnished by me to the credit union, and/or obtaining additional credit information deemed necessary by the credit union; conversely, in the absence of written instructions to the contrary, the credit union is authorized to impart such disclosures. This financial statement and other information furnished shall be the property of the credit union.

Date	Signature
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Date	Signature
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