

Personal Financial Statement



CONTACT YOUR REPRESENTATIVE AT THE BANK IF YOU HAVE ANY QUESTIONS REGARDING THE COMPLETION OF THIS FORM

Check appropriate box concerning credit request:	
<input type="checkbox"/>	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 a basis of repayment of the credit requested
<input type="checkbox"/>	This is an application for joint credit with another person. We intend to apply for joint credit. Initial Here: _____ Applicant Co-Applicant
<input type="checkbox"/>	You are applying for individual credit, but are relying on the income or assets of another person as the basis for repayment of the credit requested.

APPLICANT

NAME: _____ SOC. SEC. NO.: _____
 ADDRESS: _____ ZIP CODE: _____
 TELEPHONE # WORK: _____ HOME: _____ D.O.B: _____
 CELL #: _____ EMAIL: _____
 PRESENT EMPLOYER: _____ POSITION: _____
 HOW LONG EMPLOYED? _____
 ADDRESS: _____ ZIP CODE: _____
 NUMBER OF DEPENDENTS: _____ MARITAL STATUS: Unmarried Married Separated

CO-APPLICANT

NAME: _____ SOC. SEC. NO.: _____
 ADDRESS: _____ ZIP CODE: _____
 TELEPHONE # WORK: _____ HOME: _____ D.O.B: _____
 CELL #: _____ EMAIL: _____
 PRESENT EMPLOYER: _____ POSITION: _____
 HOW LONG EMPLOYED? _____
 ADDRESS: _____ ZIP CODE: _____
 NUMBER OF DEPENDENTS: _____ MARITAL STATUS: Unmarried Married Separated

FINANCIAL STATEMENT

(Do not edit this area. It is simply a collaboration of Schedules to be completed below)

Assets of Borrower	Amount	Liabilities of Borrower	Amount
Cash in Bank Accounts (Schedule 1)	\$ -	Total Revolving Credit (Schedule A)	\$ -
Traded Investments (Schedule 2)	\$ -	Total Installment Loans (Schedule B)	\$ -
Other Assets (Schedule 3)	\$ -	Other Liabilities (Schedule C)	\$ -
Residence Market Value (RE Schedule)	\$ -	Mortgage on Residence (RE Schedule)	\$ -
Other Real Estate Market Value	\$ -	Mortgage(s) on Other Real Estate	\$ -
Total Assets	\$ -	Total Liabilities	\$ -
		Net Worth	\$ -

SOURCES OF INCOME

Annual	Applicant	Co-Applicant	Annual	Applicant	Co-Applicant
Salary			Dividends/Interest		
Commissions			Rental Income		
Cash Distributions			Other Sources		
Other Sources					
			Total Annual Income:	\$-	\$-

FINANCIAL STATEMENT INPUTS

Schedule 1: Cash in Bank Accounts		
Account Description	Name of Bank	Current Balance
Total:		\$ -

Schedule 2: Traded Investments (Stocks, Bonds, Retirements Funds, etc.)			
Account Description	Name Registered In	Retirement?	Current Value
Total:			\$ -

Schedule 3: Other Assets (Vehicles, Business Value, Cash Values on Life Insurance, Personal Property, etc.)		
Description of Other Asset	Name Registered To	Current Value
Total:		\$ -

Real Estate Schedule Attach a separate sheet if additional space is needed

Property Type: SF = Single Family, MF = Multiple Family, C = Commercial/Industrial, L = Land/Acreage			
Property Type:	Residence <input type="checkbox"/> SF <input type="checkbox"/> MF	<input type="checkbox"/> Vacation <input type="checkbox"/> SF <input type="checkbox"/> MF <input type="checkbox"/> C <input type="checkbox"/> L	<input type="checkbox"/> Rental <input type="checkbox"/> SF <input type="checkbox"/> MF <input type="checkbox"/> C <input type="checkbox"/> L
Title In Name Of (list each):			
Property Address, City, State, Zip			
Date Purchased			
Purchase Price			
Estimated Market Value			
1st Mortgage Balance			
Lender			
Interest Rate			
Maturity Date			
Payment 1st Mortgage			
Other Mortgage/Liens			
Lender			
Payments (other mortgages)			
Annual Property Tax/Ins			
Gross Monthly Rent			

Schedule A: Total Revolving Credit (Credit Cards, Lines of Credit, etc.)				
Payable to:	Description	Commitment Amount	Payments	Balance
Total:				\$ -

Schedule B: Total Installment Loans (Student Loans, Cars, Boats, etc.)				
Payable to:	Description	Commitment Amount	Payments	Balance
Total:				\$ -

Schedule C: Other Liabilities or Loans				
Payable to:	Description	Commitment Amount	Payments	Balance
Total:				\$ -

	Applicant	Co-Applicant
1. Have you ever filed bankruptcy or has an entity you have been associated with filed bankruptcy?		
2. Are you a party to any claims or law suits?		
3. Are you obligated to pay alimony, child support or separate maintenance?		
4. Are you a co-signer or guarantor of any other debt?		
5. Have you made a will?		
6. Are you a citizen of the US?		
7. If Yes to any of the above questions (except for 5 and 6) explain below.		
8. If you have life insurance, please state the Insurance Company, Insured, Beneficiary and Face Value below.		

The foregoing statement, submitted for the purpose of obtaining credit, is true and correct in every detail and fairly shows my/our financial condition at the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition occurring before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve the credit in connection with which it is submitted. You are authorized to check my/our 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: _____

Your Signature: _____

Date: _____

Co-Applicant Signature
(if you are requesting the financial accommodation jointly) _____