

**CONFIDENTIAL PERSONAL FINANCIAL STATEMENT**

**IMPORTANT: Read these directions before completing this Statement.**

- 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 requested, complete only Sections 1 and 3.
- If you are applying for joint credit with another person, complete all Sections providing information in Section 2 about the joint applicant.
- If you are applying for individual credit, but are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all Sections, providing information in Section 2 about the person whose alimony, support, or maintenance payments or income or assets you are relying.
- If this statement relates to your guaranty of the indebtedness of other person(s), firm(s), or corporation(s), complete Sections 1 and 3.

AMOUNT REQUESTED \$ \_\_\_\_\_

THESE FUNDS WILL BE FOR **Business** ' **USE**

**Personal** ' \_\_\_\_\_

SECTION 1 - INDIVIDUAL INFORMATION (Type or Print)		SECTION 2 - OTHER PARTY INFORMATION	
Name		Name	
Residence Address		Residence Address	
City, State & Zip		City, State & Zip	
Position or Occupation	How Long	Position or Occupation	How Long
Place of Employment		Place of Employment	
Business Address		Business Address	
City, State & Zip		City, State & Zip	
Res. Phone	Bus. Phone	Res. Phone	Bus. Phone
SECTION 3 - STATEMENT OF FINANCIAL CONDITION AS OF _____			
ASSETS (Do not include Assets of doubtful value)	In Dollars (Omit cents)	LIABILITIES	In Dollars (Omit cents)
Cash on hand and in banks		Notes payable to banks - secured	
U.S. Gov't. & Marketable Securities - see Schedule B		Notes payable to banks - unsecured	
Non-Marketable Securities - see Schedule C		Due to brokers	
Securities held by broker in margin accounts		Amounts payable to others - secured	
Restricted or control stocks		Amounts payable to others - unsecured	
Partial Interest in Real Estate Equities - see Schedule D		Accounts and bills due	
Real Estate Owned - see Schedule E		Unpaid income tax	
Loans Receivable		Other unpaid taxes and interest	
Automobiles and other personal property		Real estate mortgages payable - see Schedule E	
Cash value life insurance - see Schedule F		Other debts - itemize	
Other assets - itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIAB. AND NET WORTH	

SOURCES OF INCOME FOR YEAR ENDED _____	PERSONAL INFORMATION
Salary, bonuses & commissions - Applicant \$ _____	Do you have a will? _____ if so, name of executor.
Salary, bonuses & commissions - Co-Applicant	
Real estate income	Are you a partner or officer in any other venture? If so, describe.
Dividends	
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)	Are you obligated to pay alimony, child support or separate maintenance payments? If so describe.
TOTAL \$ _____	Are you a defendant in any suits or legal actions?
CONTINGENT LIABILITIES	Personal bank accounts carried at:
Do you have any contingent liabilities? If so, describe.	
	Have you ever been declared bankrupt? If so, describe.
As indorser, co-maker or guarantor? \$ _____	Bank services
On leases or contracts? \$ _____	Currently used: None _____
Legal claims \$ _____	Checking _____ Savings _____ Certificates _____
Other special debt \$ _____	Loans _____ Trust _____ Other _____
Amount of contested income tax liens \$ _____	

**(COMPLETE SCHEDULES AND SIGN ON REVERSE SIDE)**

**SCHEDULE A - SAVINGS, TIME, CERTIFICATES OF DEPOSIT, AND MONEY MARKET ACCOUNTS**

Description	Name of Institution	In Name Of	Value

**SCHEDULE B U.S. GOVERNMENT AND MARKETABLE SECURITIES**

Number of Shares of Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Market Value

**SCHEDULE C - NON-MARKETABLE SECURITIES**

Number of Shares of Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Market Value

**SCHEDULE D - PARTIAL INTERESTS IN REAL ESTATE EQUITIES**

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Mortgage Payment	Mortgage Balance	Lender

**SCHEDULE E - REAL ESTATE OWNED**

Address & Type Of Property	Title In Name Of	Date Acquired	Cost	Market Value	Mortgage Payment	Mortgage Balance	Lender

**SCHEDULE F - LIFE INSURANCE CARRIED, INCLUDING WHOLE, TERM AND GROUP INSURANCE**

Name Of Insurance Company	Owner Of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

**SCHEDULE G - BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED**

Name & Address Of Lender	Credit In The Name Of	Collateral	Original Date	High Credit	Current Balance	Monthly Payments

For the purpose of procuring credit from time to time, I / We furnish the foregoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the Lender to verify in any manner it deems appropriate any and all items indicated on this statement. Each individual signing below authorizes Lender to check their individual credit account, employment history, obtain a consumer credit report on them and report information regarding my (our) credit history to credit reporting agencies and third parties requesting such information. The undersigned also agrees to notify the Lender immediately in writing of any significant adverse change in such financial condition.

Affirmative attestation – If this is an application for joint credit with another person, complete all sections, providing information in Section 2 about the joint application. We intend to apply for joint credit.

Signature(Individual) \_\_\_\_\_ L.S. (Other Party) \_\_\_\_\_ L.S.  
S.S. NO. \_\_\_\_\_ Date of Birth \_\_\_\_\_ S.S. NO. \_\_\_\_\_ Date Of Birth \_\_\_\_\_  
Date \_\_\_\_\_