



## PERSONAL FINANCIAL STATEMENT

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, or (4) any member, or (5) any person or entity providing a guaranty on the loan...

Name: \_\_\_\_\_ Business Phone #: \_\_\_\_\_

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

E-Mail Address: \_\_\_\_\_ Fax Number: \_\_\_\_\_

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

Business Name of Applicant/Borrower: \_\_\_\_\_

ASSETS	LIABILITIES
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Cash on Hand & in Financial Institutions...	\$ _____
Savings Accounts.....	\$ _____
IRA or Other Retirement Account.....	\$ _____
Accounts & Notes Receivable.....	\$ _____
Life Insurance - Cash Surrender Value Only	\$ _____
<i>(Complete Section 8)</i>	
Stocks & Bonds.....	\$ _____
<i>(Describe in Section 3)</i>	
Real Estate.....	\$ _____
<i>(Describe in Sections 4 and 4a)</i>	
Automobile - Present Value.....	\$ _____
Other Personal Property.....	\$ _____
<i>(Describe in Section 5)</i>	
Other Assets.....	\$ _____
<i>(Describe in Section 5)</i>	
<b>Total.....</b>	<b>\$ _____</b>

Accounts Payable.....	\$ _____
Notes Payable to Financial Institutions & Others.....	\$ _____
<i>(Describe in Section 2)</i>	
Installment Account (Auto).....	\$ _____
Mo. Payments: \$ _____	
Installment Account (Other).....	\$ _____
Mo. Payments: \$ _____	
Loan on Life Insurance.....	\$ _____
Mortgages on Real Estate.....	\$ _____
<i>(Describe in Sections 4 and 4a)</i>	
Unpaid Taxes.....	\$ _____
<i>(Describe in Section 6)</i>	
Other Liabilities.....	\$ _____
<i>(Describe in Section 7)</i>	
Total Liabilities.....	\$ _____
Net Worth.....	\$ _____
<b>Total.....</b>	<b>\$ _____</b>

SECTION 1. Source of Income	Contingent Liabilities
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Salary <i>(List source breakdown below)</i> .....	\$ _____
Net Investment Income.....	\$ _____
Real Estate Income.....	\$ _____
Other Income <i>(Describe below)*</i> .....	\$ _____

as Endorser, Co-Maker or Guarantor.....	\$ _____
Legal Claims & Judgments.....	\$ _____
Provision for Federal Income Tax.....	\$ _____
Other Special Debt.....	\$ _____

Description of Salary and Other Income in Section 1
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**Section 2. Notes Payable to Financial Institutions and Others** (Use attachments if necessary. Each attachment must be identified as part of this statement & signed)

Name & Address of Note holder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed
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**Section 3 Stocks & Bonds** (Use attachments if necessary). Each attachment must be identified as a part of this statement & signed).

Number of shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value
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Section 4	Personal Residence(s)	Property-Other	Property-Other
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<b>Ownership Name</b>			
<b>Type of Property</b>			
<b>Address</b>			
<b>Date Purchased</b>			
<b>Original Cost</b>			
<b>Present Market Value</b>			
<b>Mortgage Holder Name</b>			
<b>Mortgage Holder Address</b>			
<b>Mortgage Account Number</b>			
<b>Mortgage Balance</b>			
<b>Amount of Pmt per Mo/Yr</b>			
<b>Status of Mortgage</b>			

**Section 4a Investment Real Estate** Please complete an attachment schedule (if not included in Section above)

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**Section 5 Other Personal Property & Other Assets** (Describe, and if any is pledged as security, state name & 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 & cash surrender value of policies - name of insurance company and beneficiaries).

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I authorize the Credit Union to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S.C.1001).

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ SS# \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ SS# \_\_\_\_\_