



**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 \$ \_\_\_\_\_  
*(Complete Section 8)*  
 Stocks & Bonds..... \$ \_\_\_\_\_  
*(Describe in Section 3)*  
 Real Estate..... \$ \_\_\_\_\_  
*(Describe in Sections 4 and 4a)*  
 Automobile - Present Value..... \$ \_\_\_\_\_  
 Other Personal Property..... \$ \_\_\_\_\_  
*(Describe in Section 5)*  
 Other Assets..... \$ \_\_\_\_\_  
*(Describe in Section 5)*  
**Total..... \$ \_\_\_\_\_**

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

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

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**

\_\_\_\_\_  
 \_\_\_\_\_

**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

**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

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# \_\_\_\_\_