



5117 Green Bay Rd
Kenosha, WI 53144
(262) 657-2265

Personal Financial Statement

Type of Credit: Individual-Provide your info ONLY; Joint, with _____ Relationship _____ If non-spouse provide their information on separate PFS.

Personal Information					
Full Name		Date of Birth	Spouse's Full Name		Date of Birth
Social Security Number	<input type="checkbox"/> married-provide spouses name/address if... <input type="checkbox"/> separated ...WI resident <input type="checkbox"/> unmarried (single, widowed, divorced)		Social Security Number		
Address		Phone		Address (if different)	
City	State	Zip	Dependants		
			No: _____ Ages: _____		
Source of Income					
Employer		How Long	Spouse's Employer		How Long
Address		Phone		Address	
City		State	Zip	City	
State		Zip	State		Zip
Position/Title			Position/Title		
Previous Employer		How Long	Previous Employer		How Long
Type of Business		Position/Title		Type of Business	
		Position/Title			
Annual Income			Estimate of Annual Expenses		
Salary	\$ _____		Income Taxes	\$ _____	
Bonus & Commissions	\$ _____		Other Taxes	\$ _____	
Dividends & Interest	\$ _____		Insurance Premiums	\$ _____	
Spouse's Salary, Bonuses & Commissions	\$ _____		Mortgage Payments	\$ _____	
Net Rental (Enter from Schedule E on reverse side)	\$ _____		Rent Payable	\$ _____	
*Other income	\$ _____		Other Expenses	\$ _____	
TOTAL		\$ _____	TOTAL		\$ _____
*Income from Alimony, Child Support, or Maintenance Payments need not be disclosed unless their consideration is desired.					
*Explanation: _____					
GENERAL INFORMATION			CONTINGENT LIABILITIES		
Income Tax Return Filed Through What Year?			As Endorser, Co-maker or Guarantor? <input type="checkbox"/> yes <input type="checkbox"/> no		
Are any Assets Pledged Other Than Described on Schedules? <input type="checkbox"/> yes <input type="checkbox"/> no			On Leases or Contracts? <input type="checkbox"/> yes <input type="checkbox"/> no		
Are You a Defendant in Any Suits or Legal Actions? <input type="checkbox"/> yes <input type="checkbox"/> no			Legal Claims (judgements/liens/foreclosures)? <input type="checkbox"/> yes <input type="checkbox"/> no		
Have you ever declared bankruptcy? <input type="checkbox"/> yes <input type="checkbox"/> no			Federal - State Income Taxes? <input type="checkbox"/> yes <input type="checkbox"/> no		
Are you a partner or Officer in any other Venture? <input type="checkbox"/> yes <input type="checkbox"/> no			Unpaid taxes or assessments <input type="checkbox"/> yes <input type="checkbox"/> no		
Summary of Asset-Liability Statement (Complete SCHEDULES on reverse side)					
ASSETS			LIABILITIES		
(omit cents)			(omit cents)		
1. Cash on Hand and in Banks	Sched. A		21. Notes Due to Banks	Sched. G	
2. Cash Surrender Value of Life Insurance	Sched. B		22. Notes Due to Relatives/Friends	Sched. G	
3. U.S. Gov't Securities/Other Securities	Sched. C		23. Notes Due to Others	Sched. G	
4. Unexercised Stock Options	Sched. C		24. Accounts and Bills Payable	Sched. G	
5.			25. Loans on Life Insurance Policies	Sched. B	
6.			26. Contract Accounts Payable		
7.			27. Cash Rent Payable		
TOTAL SHORT TERM ASSETS:		\$ _____	TOTAL SHORT TERM LIABILITIES:		\$ _____
8. Real Estate Owned-do not subtract mortgages	Sched. D		29. Real Estate Mortgages Payable	Sched. D	
9. Notes and Accounts Receivable-current	Sched. F		30. Liens and Assessments Payable		
10. Notes/Accounts Receivable-over 90 days	Sched. F		31. Vehicle/Personal Installment Loans	Sched. E	
11. Notes Due from Relatives and Friends	Sched. F		32. Charge Accounts and Bills Payable		
12. Corporate, Partnership or Proprietorship Interest	Sched. H		33. Contracts Installment Loans Payable		
13. Vehicles - current value			34.		
14. Personal Property			35.		
15. IRA and Tax Deferred Accounts			36.		
16.			37.		
17.			38.		
18.			39. Other Debts - Attach Itemization		
19. Other Assets- Attach itemization					
20. TOTAL ASSETS (add lines 1 thru 19)		\$ _____	40. TOTAL DEBTS (add lines 21 thru 39)		\$ _____
			41. NET WORTH (line 20 minus line 40)		\$ _____

SCHEDULES

A CASH IN BANKS AND NOTES DUE TO BANKS					
Type	Name of Financial Institution	Balance	In Name of	Pledged	
				<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
				<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
				<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
[] See attached itemization for more					TOTALS \$

B LIFE INSURANCE (List only those policies that you own)					
Name of Company	Face Amount	Owner(s)	Beneficiary	Value	Cash Surrender Loans
[] See attached itemization for more					TOTALS \$

C SECURITIES OWNED (Including U.S. Gov't Bonds and all other Stocks and Bonds)					
No. of shares (if Stocks)	Face Value (if Bonds)	Description (indicate if Securities are restricted by contract or SEC regulations)	Owner	Market Value	Pledged
					<input type="checkbox"/> yes <input type="checkbox"/> no
					<input type="checkbox"/> yes <input type="checkbox"/> no
					<input type="checkbox"/> yes <input type="checkbox"/> no
[] See attached itemization for more					TOTALS \$

D REAL ESTATE OWNED (Indicate % of your Ownership interest)									
1. Title in the name of:	Type (SFR, duplex, etc.)/	Date	Purchase	Market Value	Amount of Mortgages and Liens	Gross Annual Debt Service	Gross Annual Income	Gross Annual Rental	Net Annual Rental Income
1.									
2.									
3.									
1.									
2.									
3.									
1.									
2.									
3.									
[] See attached itemization for more					TOTALS				

E PERSONAL PROPERTY (Indicate % of your Ownership interest)							
DESCRIPTION	% owned	Date Acquired	Purchase Price	Market Value Today	LOANS ON PROPERTY		
					Balance Due	To Whom Payable	
[] See attached itemization for more					TOTALS	\$	

F NOTES AND ACCOUNTS RECEIVABLE (Money Owed to You Individually - Indicate % of your Ownership Interest)					
Receivable From	When Due	Bal. Due - Current Accounts	Balance Due - Over 90 Days	Balance Due - Relatives & Friends	Collateral (if any)
[] See attached itemization for more					TOTALS

G NOTES AND ACCOUNTS PAYABLE (Money You are required to pay others)							
Payable To	Other Obligors	When Due	Rel./Friends	"Others"	Bills	Payable	Collateral
[] See attached itemization for more					TOTALS		

H. CORPORATE, PARTNERSHIP OR PROPRIETORSHIP INTERESTS				
Name of Company	Date Acquired	% Ownership	Partners (if any)	Ownership Value
[] See attached itemization for more				TOTALS

This information and the information provided on all accompanying financial statements and schedules is provided for the purpose of obtaining credit for the Applicant(s) or for the purpose of Applicant(s) guaranteeing credit for others. Applicant(s) acknowledge that representations made in this statement will be relied on by Bank of Kenosha in its decision to grant such credit. This statement is true and correct in every detail and accurately represents the financial condition of the applicant(s) on the date given below. Bank of Kenosha is authorized to make all inquiries deemed necessary to verify the accuracy of the information contained herein and to determine the creditworthiness of the undersigned. Applicant(s) will promptly notify Bank of Kenosha of any subsequent changes which would affect the accuracy of this statement. Bank of Kenosha is further authorized to answer any questions about its credit experience with Applicant(s). Applicant(s) are aware that any knowing or willful false statements regarding the value of the above property for purposes of influencing the actions of Bank of Kenosha can be a violation of federal law 18 U.S.C. sec. 1014 and may result in a fine or imprisonment or both.

By signing below, each representative of the Applicant declares that he/she has read and understands the statement above.

Date Signed _____ Signature _____ Signature _____
(Spouse; if joint credit with spouse)

For Married Wisconsin Residents: This credit being applied for, if granted, will be incurred in the interest of my marriage or family. I understand the Bank may give notice of this credit transaction to my spouse.

Signature _____