

SIGNATURE BANK

9800 Bren Road East, Suite #200
Minnetonka, MN 55343-6400
Phone: 952.936.7800
Fax: 952.936.7801
www.signaturebankonline.com

Personal Financial Statement

CLIENT #1 INFORMATION

Name _____
Address _____
Number of years at present address _____
Business phone _____
Telephone number _____
Drivers License Number: _____
Present employer _____
Address _____

Social Security Number _____
City _____ State _____ Zip _____
Date of Birth _____
E-mail Address: _____
Cell Phone number _____
Expiration Date: _____
Number of years at this employer _____
City _____ State _____ Zip _____

CLIENT #2 INFORMATION

Name _____
Address _____
Number of years at present address _____
Business phone _____
Telephone number _____
Drivers License Number: _____
Present employer _____
Address _____

Social Security Number _____
City _____ State _____ Zip _____
Date of Birth _____
E-mail Address: _____
Cell Phone number _____
Expiration Date: _____
Number of years at this employer _____
City _____ State _____ Zip _____

Date of Valuation _____

☞ Round all amounts to the nearest \$100

☞ Attach separate sheet if you need more space to complete detail schedule

ASSETS (ASSETS YOU OWN)		AMOUNT	LIABILITIES (DEBTS YOU OWE)		AMOUNT
Cash in this bank	Checking		Loans payable to banks (sched. 7 total)		
	Savings		Loans payable to others (sched. 7 total)		
	CD's		Installment contracts payable (sched. 7 total)		
	IRA		Amounts due to dept. stores and others		
Cash in other banks			Credit cards (MasterCard, Visa & others)		
Due from friends, relatives & others (sched. 1 total)			Income taxes payable		
Mortgage & contracts for deed owned (sched. 2 total)			Other taxes payable		
Securities owned (sched. 3 total)					
Cash surrender value of life insurance (sched. 4 total)			Loans on life insurance (sched. 4 total)		
Homestead (sched. 5 total)					
Other real estate owned (sched. 5 total)			Mortgage on homestead (sched. 6 total)		
Automobiles (year, make, model)			Mortgage or liens on other real estate owned (sched. 6 total)		
Year, Make, Model					
Year, Make, Model					
Year, Make, Model			Contracts for deed (sched. 6 total)		
Personal property					
			Other liabilities (detail)		
Other assets (detail)					
			TOTAL LIABILITIES		
			Net worth (total assets less total liabilities)		
TOTAL			TOTAL		

ANNUAL INCOME	APPLICANT	CO-APPLICANT	ANNUAL EXPENDITURES	APPLICANT	CO-APPLICANT
Salary			Federal income & other taxes		
Commissions/Bonuses			State income & other taxes		
Dividend Income			Rental payments		
Interest Income			Mortgage payments: Residential		
Rental Income			Investment		
Other Income (list)			Property Taxes: Residential		
			Investment		
			Principal & interest payments		
Alimony, child support or maintenance (you need not show this unless you wish us to consider it)			Insurance		
			Investments (including tax shelters)		
			Alimony/child support		
			Tuition		
			Medical expenses		
			Other		
TOTAL INCOME			TOTAL EXPENDITURES		

SCHEDULE 1 DUE FROM FRIENDS, RELATIVES AND OTHERS

Name of debtor	Owed to	Collateral	How payable		Maturity date	Unpaid balance
			\$	per		
			\$	per		
			\$	per		
TOTAL						

SCHEDULE 2 MORTGAGE AND CONTRACTS FOR DEED OWNED

Name of debtor	Type of property	1 st or 2 nd lien	Owed to	How payable		Unpaid balance
				\$	per	
				\$	per	
				\$	per	
TOTAL						

SCHEDULE 3 SECURITIES OWNED

No. shares or Bond amount	Description	In whose name(s) registered	Cost	Present Market Value	L-listed U-Unlisted
TOTAL					

SCHEDULE 4 LIFE INSURANCE

Insured	Insurance company	Beneficiary	Face value of policy	Cash value	Loans

SCHEDULE 5 REAL ESTATE

Address and type of property	Title in name(s) of	Monthly income	Cost		Present Market Value	Amount of Insurance
			Year acquired	Year		
<i>Homestead</i>			\$			
			Year			
			\$			
			Year			
			\$			
			Year			

SCHEDULE 6 MORTGAGE OR LIENS ON REAL ESTATE

To whom payable	How payable		Interest Rate	Maturity Date	Unpaid Balance
<i>Homestead</i>	\$	per			
	\$	per			
	\$	per			
	\$	per			
	\$	per			

SCHEDULE 7 LOANS PAYABLE TO BANKS & OTHERS AND INSTALLMENT CONTRACTS PAYABLE

To whom payable	Address	Collateral or Unsecured	How payable		Maturity Date	Unpaid Balance
			\$	per		
			\$	per		
			\$	per		
			\$	per		
			\$	per		
			\$	per		

PLEASE ANSWER THE FOLLOWING QUESTIONS:

1. Income tax returns filed through (date): _____ Are any returns currently being audited or contested? Yes No
If yes, what year(s)? _____
2. Have (either of) you or any firm in which you were a major owner ever declared bankruptcy? Yes No
If yes, please provide details: _____
3. Have you drawn a will? Yes No
If yes, please furnish the name of the executor(s) and year will was drawn: _____
4. Number of dependents (excluding self) and relationship to applicant: _____
5. Do (either of) you have a line of credit or unused credit facility at any other institution(s)? Yes No
If yes, please indicate where, how much, and name of banker: _____
6. Do you have any contingent liabilities? (as endorser, guarantor, lawsuits, taxes, other) Yes No
If yes, please indicate to whom and amounts: _____

REPRESENTATIONS AND WARRANTIES

The information contained in this statement is provided to induce **Signature Bank** to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledge and understand that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. If the undersigned fail to notify you as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, you may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, immediately due and payable. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorize any person or consumer reporting agency to give you any information it may have on the undersigned. Each of the undersigned to you is outstanding, the undersigned shall supply annually an updated financial statement. This personal financial statement and any other financial or other information that the undersigned give you shall be your property.

Date

Your Signature

Date

Co-Applicant's Signature