# 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 personal 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, compete 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.

To:

Section 1—Individual Information (Type or Print)	Section 2—Other Party Information (Type or Print)				
Name	Name				
Residence Address	Residence Address				
City, State & Zip	City, State &				
Position or Occupation		Position or C	Occupation		
Business Name		Business Na	me		
Business Address	Business Ad				
City, State & Zip		City, State &	z Zip		
Res. Phone Bus. Phone		Res. Phone		Bus. Phone	
Section 3—Statement of Financial Condition as of				<u> </u>	
Assets		Dollars		Liabilities	In Dollars
(Do not include assets of doubtful value)	(O	mit cents)			(Omit cents)
Cash on hand and in banks				e to banks-secured	
U.S. Govt. & Marketable Securities-see Schedule A			Notes payable	e to banks-unsecured	
Non-Marketable Securities-See Schedule B			Amounts payable to others-secured		
Securities held by broker in margin accounts			Amounts payable to others-unsecured		
Restricted or control stocks			Account and bills due		
Partial interest in Real Estate Equities-see Schedule C		Unpaid income tax			
Real Estate Owned-see Schedule D			Other unpaid taxes and interest		
Loans Receivable			Real estate mortgages payable –see Schedule D		
Automobiles and other personal property			Other liabilities-itemize		
Cash value-life insurance-see Schedule E					
Other assets-itemize					
			Total Liabiliti	es	
			Net Worth		
Total Assets			Total Liabiliti	es and Net Worth	

Sources of Income for Year Ended,20	Personal Information
Salary, bonuses & commissions	Do you have a will? if so, name of executor
Dividends	
Real estate income	Are you a partner or officer in any other venture? If so, describe
Other Income (Alimony, child support, or separate maintenance	
income needed 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  Contingent Liabilities	Are any assets pledged other than as described on schedules? If so, describe
Do you have any contingent liabilities? If so, describe	Income tax settled through (date)_
	Are you a defendant in any suits or legal actions?
As indorser, co maker or guarantor?	Personal Bank accounts carried at
On leases or contracts?	
Legal Claims \$	
Other special debit \$	Have you ever been declared bankrupt? If so, describe.
Amount of contest income tax liens \$	



Revised 9/04

# Schedule A—U.S. Governments & Marketable Securities

Schedule A—U.S. Governments & Marketable Securities						
Number of Shares or Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Market Value		
	•	•	•			

#### Schedule B—Non-Marketable Securities

Number of Shares	Description	In Name Of	Are These Pledged?	Source of Value	Value

Schedule C—Partial Interests in Real Estate Equities

· · · · · · · · · · · · · · · · · · ·							
Address & Type of	Title In Name Of	% Of	Date	Cost	Market	Mortgage	Mortgage Amount
Property	Title III Name Of	Ownership	Acquired	Cost	Value	Maturity	Amount

## Schedule D-Real Estate Owned

Address & Type of Property	Title In Name Of	Date Acquired	Cost	Market Value	Mortgage Maturity	Mortgage Amount

Schedule E—Life Insurance Carried, Including N.S.L.I. and Group Insurance

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

Schedule F—Banks or Finance Companies Where Credit Has Been Obtained

Name & Address of Lender	Credit In the Name of	Secured or Unsecured?	Original Date	High Credit	Current Balance

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquires you deem necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (individual)		_
S.S. No:	Date of Birth:	