

► **Sample Financial Statement**

This worksheet contains the types of information most commonly requested by lenders when making application for credit.

Amount Requested	
Purpose of Loan	

1. Co-Applicant/ Applicant 18 and Over Information

Name	
Date of Birth	
Social Security Number	
Driver's License Number	
Street Address	
City	
State	
Zip	
Years There	
Home Phone	
Number of Dependents	
Previous Address (<i>if less than five years at present</i>)	
City	
State	
Zip	
Years There	
Employer's Name	
Employer's Address	
Position	

Business Phone	
Years There	
Annual Salary	
Other Income	
Previous Employer	
Position	
Annual Salary	
Years There	
Nearest Relative Not Living With You	
Address	
Phone	

2. Additional Co-Applicant

Name	
Date of Birth	
Social Security Number	
Street Address	
City	
State	
Zip	
Years There	
Home Phone	
Employer's Name	
Position	
Business Phone	

Years There	
Annual Salary	
Other Income	

3. Bank References

Bank	
Checking Account Number	
Bank	
Savings Account Number	

4. Assets

Cash, Savings, Checking, Money Market Funds	
Stocks and Bonds	
Real Estate Owned	
Car	
Other	
Total Assets	

5. Liabilities (Credit Obligations)

Home Financed by: (OR) Rented From:	
Account Number	
Original Amount	
Balance	
Monthly Payment	
Car Loan Held By	
Account Number	

Original Amount	
Balance	
Monthly Payment	

6. Other Credit Obligations (Loans, Credit Cards, etc.)

Company	
Amount Owed	
Monthly Payment	
Company	
Amount Owed	
Monthly Payment	
Company	
Amount Owed	
Monthly Payment	
TOTAL AMOUNT OWED	
TOTAL MONTHLY PAYMENTS	

*Have you ever been the subject of a bankruptcy proceeding or are there any unsatisfied judgments against you?
(Yes or No)*

Everything I have stated in this application is correct to the best of my knowledge. I understand that XYZ Bank will retain this application whether or not it is approved. I authorize the bank to check my credit and employment history and to answer future questions about its credit experience(s) with me.

Signature: _____