



PERSONAL FINANCIAL STATEMENT

- ☐ I am applying for individual credit and will rely on my own income and assets to repay any loan (fill in the sections relating to applicant only)
- ☐ We are applying for credit together. We want you to look at all our income and assets in evaluating this application

(furnish all the information requested, including information about the co-applicants)

Purpose:

SECTION 1 - INDIVIDUAL INFORMATION (Type or Print)		SECTION 2 - CO-APPLICANT INFORMATION (Type or Print)	
Name		Name	
Address	How Long	Address	How Long
City, State, Zip		City, State, Zip	
Occupation	How Long	Occupation	How Long
Business Name		Business Name	
Business Address		Business Address	
City, State, Zip		City, State, Zip	
Home Phone	Work Phone	Home Phone	Work Phone

SECTION 3 - STATEMENT OF FINANCIAL CONDITION AS OF _____			
ASSETS (Do not include Assets of doubtful value)	In Dollars (omit cents)	LIABILITIES	In Dollars (omit cents)
Cash on hands & in banks - See Sched. E		Notes payable to banks-secured- See Sched.-E	
US Govt & Marketable Securities - See Sched. A		Notes payable to banks-unsecured- See Sched.-E	
Non-Marketable Securities - See Sched. A		Due to brokers	
Securities held by broker in margin a/cs -See Sched. A		Amounts payable to others-secured	
Restricted or controlled stocks - See Sched. A		Amounts payable to others-unsecured	
Partial interest in Real Estate Equities - Sched. B		Accounts and bills due	
Real Estate Owned - See Sched. C		Unpaid income tax	
Loans Receivable		Other unpaid taxes and interest	
Automobiles and other personal property		Real Estate mortgages payable - See Sched.-D	
Cash value of life insurance		Other debts - itemize	
Retirement Assets			
Other Assets - itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIABILITIES & NET WORTH	

PERSONAL INFORMATION	
SOURCES OF INCOME FOR YEAR ENDED: _____, _____	Do you have a will? _____ Executor
Salary, bonuses & commissions \$	Number of dependents
Dividends	Face amount of life insurance
Interest	Are you a partner or officer in any venture? If yes, describe:
Real Estate	
Other income (Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repayment of this obligation)	Are any assets pledged other than described on schedules? If yes, describe:
TOTAL ANNUAL SOURCES OF INCOME \$	Income tax settled through (date)
CONTINGENT LIABILITIES	Are you a defendant in any suites or legal actions?
Do you have any contingent liabilities? If so, describe:	Total monthly rental payments:
	To whom paid?
	Have you ever declared bankruptcy? If yes, describe:
As endorser, co-maker or guarantor? \$	List any other names under which you have applied for or obtained credit:
On leases or contracts? \$	
Legal Claims? \$	
Other special debts? \$	
Amount of contested income tax liabilities \$	Are you obligated to pay alimony, child support or separate maintenace payments? If yes, describe:
Other contingent liabilities \$	

SCHEDULE A - MARKETABLE SECURITIES					
No. of shares (stock) or Face Value (Bonds)	Description	Marketable?	In Name of	Pledged	Market Value

SCHEDULE B - PARTIAL INTEREST IN REAL ESTATE EQUITIES						
Address of Property	Title in Name of	% Owned	Date Acquired	Cost	Market Value	Mortgage Amount

SCHEDULE C - REAL ESTATE OWNED						
Address of Property	Title in Name of	Annual Income	Date Acquired	Cost	Market Value	Mortgage Amount

SCHEDULE D - MORTGAGE INDEBTEDNESS						
Property # From Sch. C	Mortgage Holder	Interest Rate	1st, 2nd, 3rd lien?	Mortgage Balance	Mortgage Maturity	Monthly Payment

SCHEDULE E - BANKS OR OTHER INSTITUTIONS WHERE ACCOUNTS ARE MAINTAINED OR WHERE CREDIT HAS BEEN OBTAINED (Show joint accounts or joint obligations by checking Box 'J')							
Name of Depository	Name of Joint Owner Or Joint Obligor	Balance on Deposit	J	Loan Balance	J	How is the loan payable	How is the loan secured?

I authorize you to make whatever credit inquires you consider necessary concerning the statements made in the loan application. I agree that the application shall remain the bank's property whether or not the loan is granted. I also agree that you may give information regarding my experience with you to credit bureaus and other proper persons. I have carefully prepared the answers given above and certify they are correct to the best of my knowledge.

Applicant's Signature

Date

Co-Applicant's Signature

Date

Social Security No.:

Date of Birth

Social Security No.:

Date of Birth