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 person 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, complete 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 on whose alimony, child 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 & Zip	
Position or occupation		Position or occupation	
Business Name		Business Name	
Business Address		Business Address	
City, State & Zip		City, State & Zip	
Res. Phone	Bus. Phone	Res. Phone	Bus. Phone
S.S. No.	Date of Birth	S.S. No.	Date of Birth

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 hand and in banks	$	Notes payable to banks - secured	$
U.S. Gov't. & Marketable Securities (see Schedule A)		Notes payable to banks - unsecured	
Non-Marketable Securities (see Schedule B)		Notes payable to relatives	
Real Estate Owned (see Schedule C)		Unpaid taxes	
Notes Receivable		Real estate mortgages payable (see schedule C)	
Furniture & Fixtures		Other debts (see schedule E)	
Automobiles			
Cash value - Life Insurance (see Schedule D)			
Other assets - Itemize:			
		TOTAL LIABILITIES	$
		NET WORTH	$
TOTAL ASSETS	$	TOTAL LIABILITY AND NET WORTH	$

SOURCES OF INCOME FOR YEAR ENDED	
Salary, bonuses & commissions	$
Dividends	
Real estate income	
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 repaying this obligation. Alimony, child support, separate maintenance received under: ☐ court order ☐ written agreement ☐ oral understanding. (If this application is being taken orally, this preceding statement should be read prior to asking any questions concerning income).	
TOTAL	$

CONTINGENT LIABILITIES	
Do you have any contingent liabilities? If so, describe.	
As indorser, co-maker or guarantor?	$
On leases or contracts?	
Legal claims	
Other special debt	

PERSONAL INFORMATION (Give details on back)
Do you have a will? ☐ Yes ☐ No If so, name of executor:
Are you a partner or an officer in any venture? If so, describe: ☐ See back.
Are you obligated to pay alimony, child support or separate maintenance payments? If so, describe:
Are any assets pledged other than as described on schedules? If so, describe:
Income tax settled through (date):
Are you a defendant in any suits or legal actions?
Personal bank accounts carried at:
Have you ever been declared bankrupt in the last 14 years? ☐ Yes ☐ No

(COMPLETE SCHEDULE AND SIGN ON REVERSE SIDE)

SCHEDULE A - U.S. GOVERNMENT & 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 - REAL ESTATE OWNED

ADDRESS & TYPE OF PROPERTY	TITLE IN NAME OF	DATE ACQUIRED	COST	MARKET VALUE	MORTGAGE MATURITY	MORTGAGE AMOUNT

SCHEDULE D - LIFE INSURANCE CARRIED, INCLUDING GROUP INSURANCE

NAME OF INSURANCE COMPANY	OWNER OF POLICY	BENEFICIARY	FACE AMOUNT	POLICY LOANS	CASH SURRENDER VALUE

SCHEDULE E - OTHER DEBTS

NOTES AND ACCOUNTS OWED BY ME TO:	CURRENT AMOUNT	PAYMENT	DESCRIPTION OF SECURITY PLEDGE

ADDITIONAL PERSONAL INFORMATION

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 change is given to you by the undersigned. You are authorized to make all inquiries 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. The undersigned acknowledge(s) receipt of a copy of this instrument.

DATE

SIGNATURE (INDIVIDUAL)

SIGNATURE (OTHER PARTY)