



Type of Credit - Check the Appropriate Box

Individual - If you check this box, provide Financial Information only about yourself.

Joint, with \_\_\_\_\_ Relationship \_\_\_\_\_ If you check this box, provide Financial Information about yourself and the other person.

## PERSONAL FINANCIAL STATEMENT OF

Name \_\_\_\_\_ Birth Date \_\_\_\_\_ Statement Date \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Social Sec. No. \_\_\_\_\_

Home Phone \_\_\_\_\_ No. of Dependents \_\_\_\_\_ Bus. or Occupation \_\_\_\_\_ Bus. Phone \_\_\_\_\_

### SECTION I

**A - Cash In Banks and Notes Due To Banks**

Name of Bank	Type of Account	Type of Ownership	On Deposit	Notes Due Banks	COLLATERAL (If Any) & Type of Ownership
Cash on Hand					
TOTALS					

(Sec II Line 1)      (Sec II Line 21)

**B - Brokerage Accounts and Securities Owned (Including U.S. Gov't Bonds and all other Stocks and Bonds)**

Face Value - Bonds No. of Shares Stock	Description <small>Indicate Those Not Registered in Your Name</small>	Type of Ownership	Cost	Market Value U.S. Gov Sec.	Market Value Marketable Sec.	Market Value Not Readily Marketable Securities	Amount Pledged to Secured Loans
TOTALS							

(Sec II Line 2)      (Sec II Line 3)      (Sec II Line 12)

**C - Real Estate Owned (Indicate by a ✓ if others have an ownership interest)**

Title In Name Of	<input checked="" type="checkbox"/>	Description & Location	Date Acquired	Original Cost	Present Value of Real Estate	Amount of Ins. Carried	Mortgage or Contract Payable			
							Bal. Due	Payment	Maturity	To Whom Payable
Homestead-										
TOTAL						TOTAL				

(Sec II Line 11)      (Sec II Line 34)

**D - Mortgages And Contracts Owned (Indicate by a ✓ if Others have an Ownership Interest)**

Cont.	Mtge.	<input checked="" type="checkbox"/>	Maker		Property Covered	Starting Date	Payment	Maturity	Balance Due
			Name	Address					
TOTAL									

(Sec II Line 4)

**E - Personal Property (Indicate by a ✓ if Others have an Ownership Interest)**

Description	<input checked="" type="checkbox"/>	Date When New	Cost When New	Value Today	Loans on Property	
					Balance Due	To Whom Payable
Automobiles-						
TOTAL						

(Sec II Line 13)

F - Life Insurance (List only those policies that you own)

Company	Face of Policy	Cash Surrender	Policy Loan from	Other Loans	Beneficiary
TOTALS					

(Sec II Line 5) (Sec II Line 27)

G - Notes (Other than Bank, Mortgage and Insurance Company Loans)

ACCOUNTS, BILLS AND/OR CONTRACTS PAYABLE

Payable To	Other Obligors (If Any)	When Due	Notes Due To Rel. & Friends	Notes Due 'Others' (Not Banks)	Accounts & Bills Payable	Contracts Payable	Collateral (If Any)
TOTALS							

(Sec II Line 22) (Sec II Line 23) (Sec II Line 24) (Sec II Line 28)

**SECTION II**

Assets		Amount	Liabilities		Amount
1 Cash on Hand & In Banks	(Sec I-A)		21 Notes Due to Banks	(Sec I-A)	
2 U.S. Gov. Securities	(Sec I-B)		22 Notes Due To Relatives & Friends	(Sec I-G)	
3 Other Marketable Securities	(Sec I-B)		23 Notes Due to Others	(Sec I-G)	
4 Mortgages & Contracts Owned	(Sec I-D)		24 Accounts & Bills Payable	(Sec I-G)	
5 Cash Value of Life Insurance	(Sec I-F)		25 Unpaid Income Taxes Due	<input type="checkbox"/> Federal <input type="checkbox"/> State	
6 Other Assets Readily Convertible to Cash - Itemize			26 Other Unpaid Taxes & Interest		
7			27 Loans on Life Insurance Policies	(Sec I-F)	
8			28 Contract Accounts Payable	(Sec I-G)	
9			29 Cash Rent Owed		
10 TOTAL CURRENT ASSETS			30 Other Liabilities Due within 1 Year - Itemize		
11 Real Estate Owned	(Sec I-C)		31		
12 Other Securities - Not Readily Marketable	(Sec I-B)		32		
13 Personal Property	(Sec I-E)		33 TOTAL CURRENT LIABILITIES		
14 Other Assets - Itemize			34 Real Estate Mortgages Payable	(Sec I-C)	
15			35 Liens & Assessments Payable		
16			36 Other Debts - Itemize		
17			37		
18			38 Total Liabilities		
19			39 Net Worth (Total Assets minus Total Liabilities)		
20 TOTAL ASSETS			40 TOTAL LIABILITIES & NET WORTH		

Annual Income		Estimate of Annual Expenses	
Salary, Bonuses & Commissions	\$	Income Taxes	\$
Dividends & Interest	\$	Other Taxes	\$
Rental & Lease Income (Net)	\$	Insurance Premiums	\$
<b>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.</b>		Mortgage Payments	\$
Other Income - Itemize	\$	Rent Payable	\$
Provide the following information only if Joint Credit is checked above.		Other Expenses	\$
Other Persons Salary, Bonuses & Commissions	\$		\$
<b>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.</b>			\$
Other Income of Other Person - Itemize	\$		\$
TOTAL	\$	TOTAL	\$

General Information		Contingent Liabilities	
Are any Assets Pledged?	<input type="checkbox"/> No <input type="checkbox"/> Yes (See Section I)	As Endorser, Co-maker or Guarantor	\$
Are you a Defendant in any Suits or Legal Actions?	<input type="checkbox"/> No <input type="checkbox"/> Yes	On Leases or Contracts	\$
Explain:		Legal Claims	\$
Have you ever Been declared Bankrupt in the last 10 Years?	<input type="checkbox"/> No <input type="checkbox"/> Yes	Federal - State Income Taxes	\$
Explain:		Other	\$

For the purpose of procuring credit from time to time, I/We furnish the foregoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the Lender to verify in any manner it deems appropriate any and all items indicated on this statement. In addition, each individual signing below authorizes the Lender to check their individual credit account and employment history and have a credit reporting agency prepare a consumer credit report on them. The undersigned also agrees to notify the Lender immediately in writing of any significant adverse change in such financial condition.

Note: Any willful misrepresentation could result in a violation of Federal Law (Sec. 18 U.S.C. 1040)

Date Signed \_\_\_\_\_ Signature \_\_\_\_\_ Signature \_\_\_\_\_