

# Personal Financial Statement



CONTACT YOUR REPRESENTATIVE AT THE BANK  
IF YOU HAVE ANY QUESTIONS REGARDING THE  
COMPLETION OF THIS FORM

Check appropriate box concerning credit request:

\_\_\_\_\_ 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 a basis of repayment of the credit requested.

\_\_\_\_\_ This is an application for joint credit with another person.

We intend to apply for joint credit. Please initial here:

\_\_\_\_\_ Applicant

\_\_\_\_\_ Co-Applicant

\_\_\_\_\_ You are applying for individual credit, but are relying on the income or assets of another person as the basis for repayment of the credit requested.

## **APPLICANT**

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

Present Employer \_\_\_\_\_ Position \_\_\_\_\_

Employer Address \_\_\_\_\_

## **CO-APPLICANT**

Name \_\_\_\_\_ Social Security # \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

Present Employer \_\_\_\_\_ Position \_\_\_\_\_

Employer Address \_\_\_\_\_

- Round all amount to the nearest \$100
- Attach separate sheet if you need more space to complete detail schedule

Date of Valuation \_\_\_\_\_

ASSETS	AMOUNT	LIABILITIES	AMOUNT
Cash in this Bank		Notes Payable Banks (Schedule 7)	
Cash in Other Banks (Detail)		Notes Payable Others and Installment (Schedule 7)	
		Installment Contracts Payable (Schedule 7)	
		Due Dept. Stores, Credit Cards & Others	
Due from Friend/Relative/Others (Sched. 1)		Income Taxes Payable	
Mtg & Contracts for Deed Owned (Sched. 2)		Other Taxes Payable	
Securities Owned (Schedule 3)			
Cash Surrender Value of Life Insur. (Sched. 4)		Loans on Life Insurance (Schedule 4)	
Homestead (Schedule 5)			
Other Real Estate Owned (Schedule 5)		Mortgage on Homestead (Schedule 6)	
Automobiles		Mortgage or Liens on Other Real Estate	
		Owned (Schedule 6)	
Personal Property		Other Liabilities (Detail)	
Other Assets (Detail)			
		TOTAL LIABILITIES	
		Net Worth (Total Assets - Total Liabilities)	
TOTAL		TOTAL	

ANNUAL INCOME	APPLICANT	CO-APPLICANT	CONTINGENT LIABILITIES	
Salary			As Endorser	
Commissions			As Guarantor	
Dividends			Lawsuits	
Interest			For Taxes	
Rentals			Other (Detail)	
Alimony/Child support/maintenance (you need not show this unless you wish us to consider it).				
Other			<input type="checkbox"/> Check here if "None"	
TOTAL INCOME			TOTAL CONTINGENT LIABILITIES	

**SCHEDULE 1 DUE FROM FRIENDS, RELATIVES & OTHERS**

Name of Debtor	Owed To	Collateral	How Payable	Maturity Date	Unpaid Balance
			\$ - per		
			\$ - per		
			\$ - per		
TOTAL					

**SCHEDULE 2 MORTGAGE AND CONTRACTS FOR DEED OWNED**

Name of Debtor	Type of Property	1st or 2nd Lien	Owed To	How Payable	Unpaid Balance
				\$ - per	
				\$ - per	
				\$ - per	
				\$ - per	
TOTAL					-



	<u>APPLICANT</u>		<u>CO-APPLICANT</u>	
Have you ever gone through bankruptcy or had a judgment against you?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are any assets pledged or debts secured except as shown?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you made a will?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Number or Dependents (If "None" check None)	_____ <input type="checkbox"/> None		_____ <input type="checkbox"/> None	
Marital Status (answer only if this financial statement is provided in connection with a request for secured credit or applicant is seeking a joint account with spouse.)	<input type="checkbox"/> Married		<input type="checkbox"/> Married	
	<input type="checkbox"/> Separated		<input type="checkbox"/> Separated	
	<input type="checkbox"/> Unmarried		<input type="checkbox"/> Unmarried	

(Unmarried includes single, divorced, widowed)

The foregoing statement, submitted for the purpose of obtaining credit, is true and correct in every detail and fairly shows my/our financial condition at the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition occurring before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve the credit in connection with which it is submitted. You are authorized to check my/our credit and employment history or any other information contained herein.

THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Applicant Signature (if you are requesting the financial accommodation jointly)