

Personal Financial Statement

Do not send sensitive personal or financial information unless it is encrypted on a secure website.

Regular e-mails are not encrypted.



Personal Financial Statement

I may apply for a credit extension, loan or other financial accommodation alone or together with someone else ("co-applicant"). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this statement and any supporting schedules jointly, otherwise separate forms and schedules are required.

Email Address:				Email Address:						
		Applicant		Co-Applicant						
Full Name:				Full Name:						
Street Address:				Street Address:						
City/State/Zip:				City/State/Zip:						
County:				County:						
Since:	Own	☐ Rent \$	per month	Since:	Own	☐ Rent \$	per month			
Driver's License #: Qe → ^AÖææ^K#########Exp. Date:			Driver's License #: ℚ•ັ^/Öæz^\K\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\							
Social Security	#:		Birth Date:	Social Security#	ŧ		Birth Date:			
Home Phone:			Cell:	Home Phone:			Cell:			
Work/Business	Phone:			Work/Business Phone:						
Employer:				Employer:						
Address:				Address:						
Position/title:			Since:	Position/title: Since:						
# of dependent	s (including self):	·	<u> </u>	# of dependents (including self):						
Marital Status*	☐Unmarried ☐	☐Married ☐Sepa	arated	Marital Status*	☐Unmarried ☐]Married □Sepa	arated			

Please complete schedules 1 thru 6 on the following pages before the section below.

ASSETS (round to nearest \$100) (Refer to schedules 1 thru 5 on following page for detail)	LIABILITIES (round to nearest \$100) (Refer to schedules 4 thru 6)						
Cash, Savings, CDs, Money Mkt. (schedule 1)	Notes payablebanks (schedule 6)						
Marketable Securities/Stocks/Bonds (schedule 2)	Notes payableothers (schedule 6)						
Retirement, IRA, profit share, Keogh (schedule 3)	Installment loans/contracts (schedule 6)						
Cash value life ins. (whole life only) (schedule 4)	Loans against life insurance (schedule 4)						
Homestead (schedule 5)	Personal mortgage (homestead) (schedule 5)						
Other personally held real estate (schedule 5)	Other personal mortgages (schedule 5)						
Com'l Real Estate owned (schedule 5)	Com'l mortgage debt (schedule 5)						
Value of my companies excluding Real Estate	Taxes due						
	Total credit card debt (schedule 6)						
	Other loans (schedule 6)						
Deferred income/receivables (describe)							
Autos, Other Personal Property (describe)							
	Total Liabilities: \$						
Total Assets: \$	Net Worth (total assets less total liabilities): \$						

(Use attachments if more space is needed)

^{*} Do not provide marital status if your application is for individual credit

Round all amounts to the nearest \$100. Please contact your banker if you need assistance completing the schedules.

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Name of Bank o	or Financiai ins	stitution		Type of A	ccount								Acc	ct. Balance
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·	(use attachr	ments if	necessary)									Total \$		
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chedule 6 Notes payable to	banks/others, Insta	llment lo	ans, Au	to Ioans, Credi	t Car	ds, Line	es of cred	dit, B	ills du	ıe
Name of Creditor/Lender/Party Owed	Collateral (if any)	Monthly p	payments	Balance Due	E	Explanatio	n			
					_					
					•					
Annual Income	Applicant Co-A	pplicant		gent Liabilities			Applica	ant	Co-A	pplicant
Salary			As End			-				
Bonuses/Commisions			As Gua							
Dividends/Interest			Lawsui	ts					<u> </u>	
Rental/Real Estate Income Income from child support need not be entered			Taxes							
unless you want to consider it			Other (list)						
Other (list)										
Total:						Total:				
					-					
	•					Applic			Co-Appli	
Have you ever gone through bankruptc						□Yes □Yes	□No □No		Yes Yes	□No □No
Have you ever had a judgment against Do you have any suits or legal action ag					_	∐ Yes ∐Yes	□No		Yes	
Are there any of your tax obligations pa					-	☐Yes	□No		Yes	□No
Have you made a will?	ist das.					☐Yes	□No		Yes	□No
Are you a co-maker, endorser or guara	ntor of any other person's	debt?				□Yes	□No		Yes	□No
Explanation (if necessary):										
This statement is given to you for the nur	race of obtaining arodit. I	t io truo and	l correct in	avany datail and fai	rly obe	wa mulau	r financial o	onditio	n at thic	timo
This statement is given to you for the pur										
/we will give you prompt written notice of understand that you will keep this person										
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