

Personal Financial Statement



Name		Date of Birth		Social Security #		Driver's Lic #		<input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Separated	
Street Address		City and State		Zip		Phone #		How long at address?	
						<input type="checkbox"/> Own Home <input type="checkbox"/> Buying		<input type="checkbox"/> Renting <input type="checkbox"/> Other	
Name & Address of Employer		Position		Length of Emp.		Business Phone		Ages of Dependents	
Co-Applicant / Spouse Name		Date of Birth		Social Security #		Driver's Lic #			
Name & Address of Employer		Position		Length of Emp.		Business Phone			

If married, you may apply for a separate account. If you are married, complete all information for yourself and your spouse. You do not have to list spouse's separate property unless this is an application for a joint account. 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.

Financial Information as of

ASSETS	AMOUNT	LIABILITIES	AMOUNT	MONTHLY PAYMENT
Cash in Credit Union		Due to Credit Union		
Cash in other financial institutions		Income taxes and Other taxes payable		
Securities owned (Schedule 1)	\$ -	Installment contracts and notes payable to banks & others (Schedule 3)	\$ -	\$ -
Notes Receivable including mortgages & Deeds of Trust Owned (Schedule 2)	\$ -	Revolving Credit (Schedule 4)	\$ -	\$ -
IRA/Keogh/Pension/401K		Loans on Life insurance		
Other Investments (Partnerships, etc.- Schedule 5)	\$ -	Mortgages or Liens on Real Estate (Schedule 6)	\$ -	\$ -
Real Estate Owned (Schedule 6)	\$ -	Other Liabilities (detail)		
Automobiles				
Cash Value of Life Insurance				
Personal Property and Other Assets (detail)				
		Total Liabilities/Payments	\$ -	\$ -
		NET WORTH	\$	-
TOTAL ASSETS ==>	\$ -	TOTAL LIABILITIES & NET WORTH ==>	\$	-

ANNUAL INCOME	AMOUNT	ANNUAL EXPENDITURES	AMOUNT	CONTINGENT LIABILITIES	AMOUNT
Applicant Salary		Interest		As Endorser	
Co-Applicant/Spousal Salary		Property Tax/Assessments		As Guarantor	
Dividends/Bonds		Income and other taxes		Letters of Credit	
Interest		Mortgage Payments		Other (detail)	
Rentals (Schedule 6)	\$ -	Other Contract Payments			
Other (detail)		Rent			
		Insurance			
		Alimony, Child Sup/Maint.			
If you are married and live in a community property state, your your earnings, your spouse's earnings and all "other income" are presumed to be community property unless you indicate otherwise.		Personal Expenses			
		Other (detail)			
TOTAL ==>	\$ -	TOTAL ==>	\$ -	TOTAL ==>	\$ -

<p>GENERAL INFORMATION - if married these questions apply to both you and your spouse:</p> <p>Are any assets held in Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are any assets pledged or debts secured except as shown? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever had a repossession? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever had a bankruptcy or had a judgment against you? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever settled a debt for less than the balance due, including Deed in Lieu or Short Sale? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you ever been a principal or guarantor of a firm that declared bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are you party to any claim or suits? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Has there been an IRS audit in the past 3 years? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, has the audit been settled? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Life insurance amount: _____ Beneficiary: _____</p>	<p>Comments:</p>
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