

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, 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 corporations(s), complete Sections 1 and 3.

SECTION 1 – INDIVIDUAL INFORMATION								
Last Name		First	M	Social Security Number	Date of Birth	U.S. Citizen Yes No	Number of Dependents	Home Telephone
Street Address				City	State	Zip Code	How long at this address Yrs. _____ Months _____	

Employed By \_\_\_\_\_ Position \_\_\_\_\_ How Long \_\_\_\_\_

Address \_\_\_\_\_ Telephone \_\_\_\_\_

Give details of Contingent Liability (As endorser, co-maker or guarantor) \_\_\_\_\_

Are you obligated to make payments for: Alimony \_\_\_\_\_ Child Support \_\_\_\_\_ Separate Maintenance \_\_\_\_\_? Specify Amount \$ \_\_\_\_\_ Monthly

SECTION 2 – OTHER PARTY INFORMATION								
Last Name		First	M	Social Security Number	Date of Birth	U.S. Citizen Yes No	Number of Dependents	Home Telephone
Street Address				City	State	Zip Code	How long at this address Yrs. _____ Months _____	

Employed By \_\_\_\_\_ Position \_\_\_\_\_ How Long \_\_\_\_\_

Address \_\_\_\_\_ Telephone \_\_\_\_\_

SECTION 3 – STATEMENT OF FINANCIAL CONDITION AS OF \_\_\_\_\_, 20\_\_\_\_\_

ASSETS		LIABILITIES	
1) Cash on hand and in banks (Itemize in Schedule A)		12) Notes payable to banks (Schedule H)	
2) Mortgages or trust notes due to me (Schedule B)		Secured	
3) Other notes and accounts due to me		Unsecured	
4) Stocks and Bonds (Schedule C)		13) Loans against Cash Value of Life Insurance (Schedule D)	
5) Cash Value of Life Insurance (Schedule D)		14) Notes payable to others (Schedule I)	
6) Real Estate (Schedule E)		15) Credit Cards and Bills Payable (Schedule J)	
7) Retirement Accounts		16) Loans on Machinery, Equipment, Autos and Trucks (From Schedule F)	
8) Machinery, Equipment, Autos, and Trucks (Schedule F)		17) Real Estate Mortgages Payable (From Schedule E)	
9) Household Furnishing and other Personal Property		18) Taxes Due	
10) Other Assets, to include ownership in Unincorporated business venture(s) and livestock (Itemize in schedule G)		19) Other Liabilities	
		20) Total Liabilities (Add lines 12 through 19)	
		21) Net Worth (Subtract line 20 from line 11)	
11) Total Assets (Add lines 1 through 10)		22) Total Liabilities and Net Worth (Add lines 20 and 21)	

\*Notice: 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).

Annual Income:	INDIVIDUAL	OTHER PARTY
Salary -----		
Bonus & Commissions--		
Interest & Dividends----		
Rental Income-----		
* Other Income-----		
Total Income-----		

Other Income: Alimony, Child Support, separate maintenance received under:

- ☐ court order  
☐ written agreement  
☐ oral understanding

(Answer "Yes" or "No")	INDIVIDUAL	OTHER PARTY
Are you a defendant in any suits or legal action? -----		
Are there any judgments unsatisfied against you? -----		
Have you been through bankruptcy or made settlement with creditors within the last 7 years? -----		
Are there any claims for prior years' Federal or State Income Taxes against you?-----		

#### SCHEDULE (A) CASH IN BANKS

NAME OF BANK	TYPE OF ACCOUNT	ACCOUNT NUMBER	BALANCE

#### SCHEDULE (B) MORTGAGES OR TRUST NOTES DUE TO ME

ADDRESS OF PROPERTY	MAKER	DATE ACQUIRED	ORIGINAL BALANCE	PRESENT BALANCE	TERMS OF REPAYMENT

#### SCHEDULE (C) STOCKS AND BONDS OWNED please provide complete list, attach addendum if necessary

NUMBER OF SHARES (STOCKS) FACE VALUE (BONDS)	NAME OF COMPANY	EXCHANGE LISTED ON (note if unlisted)	MARKET VALUE	AMOUNT PLEDGED OR ON MARGIN (INCLUDE ON LINE 19)

#### SCHEDULE (D) LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE

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

**SCHEDULE (E) REAL ESTATE OWNED**  
**please provide complete list, attach addendum if necessary**

DESCRIPTION AND ADDRESS	CITY OR COUNTY	TITLED IN NAME OF	DATE ACQUIRED	COST	FAIR MARKET VALUE	MORTGAGE BALANCE	MONTLY PMT.	NAME AND ADDRESS

**SCHEDULE (F) MACHINERY, EQUIPMENT AUTOS AND TRUCKS**

ASSET DETAIL (include year, make, model)	ASSET VALUE	LOAN BALANCE	MONTHLY PAYMENT

**SCHEDULE (G) OTHER ASSETS ITEMIZED**

ASSET DETAIL	Asset Pledged or Outstanding Lien	Monthly Debt Obligation

**SCHEDULE (H) NOTES PAYABLE TO BANKS**

NAME OF BANK	PURPOSE	ORIGINAL AMOUNT	BALANCE OWING	TERMS OF REPAYMENT

**SCHEDULE (I) NOTES PAYABLE TO OTHERS**

NAME OF BANK	PURPOSE	ORIGINAL AMOUNT	BALANCE OWING	TERMS OF REPAYMENT

**SCHEDULE (J) CREDIT CARDS AND BILLS PAYABLE (Itemize every debt over \$100.00)**

NAME AND ADDRESS OF COMPANY	PURPOSE	AMOUNT OWING	TERMS OF REPAYMENT

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 a change is given to you by the undersigned. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statement made herein, and to determine my/our creditworthiness. You are authorized to answer questions about your credit experience with me/us.

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

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