



**PERSONAL FINANCIAL STATEMENT**

Date: \_\_\_\_\_

Important Information when applying for a loan: To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

Section 1 - Individual Information (type or print)			
Applicant Name:		Co Applicant's Name:	
Date of Birth:	Social Security #	Date of Birth:	Social Security #
Home Phone:	Email:	Home Phone:	Email:
Address:		Address:	
City, State, Zip:		City, State, Zip:	
<input type="checkbox"/> Own	<input type="checkbox"/> Rent \$ _____ Rent per Month	<input type="checkbox"/> Own	<input type="checkbox"/> Rent \$ _____ Rent per Month
# of Dependents:	Age of Dependents:	# of Dependents:	Age of Dependents:
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Separated		Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Unmarried <input type="checkbox"/> Separated	
Employer's Name:		Employer's Name:	
Job Position:		Job Position:	
Business Phone:	Years on Work:	Business Phone:	Years on Work:

Section 2 - Annual Income				
Gross Annual Income	Applicant	Co-Applicant	Total	Describe Other Income
Base Employment Income	\$ _____	\$ _____	\$ _____	Notice: Alimony, child support or separate maintenance income need not be disclosed if the Applicant or Spouse does not wish to have the income considered as a basis for repaying this loan.
Overtime	\$ _____	\$ _____	\$ _____	
Commissions	\$ _____	\$ _____	\$ _____	
Dividends/Interest	\$ _____	\$ _____	\$ _____	
Rental Income	\$ _____	\$ _____	\$ _____	
Alimony/Child Support	\$ _____	\$ _____	\$ _____	
Other Annual Income	\$ _____	\$ _____	\$ _____	
Other Annual Income	\$ _____	\$ _____	\$ _____	
Other Annual Income	\$ _____	\$ _____	\$ _____	
<b>Total</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>	

Section 3 - Financial Condition as of Signed Date			
Assets	Amount	Liabilities	Amount
Cash, Checking & Savings, CD's - see Schedule A	\$ _____	Revolving Credit - See Schedule D	\$ _____
Publicly Traded Investments - see Schedule B	\$ _____	Installment Loans - See Schedule E	\$ _____
Other Assets - See Schedule C	\$ _____	Mortgage Loans - See Schedule of Real Estate	\$ _____
Net Worth of Business(es) Owned	\$ _____	Other Liabilities - See Schedule F	\$ _____
Real Estate Owned - See Schedule of Real Estate	\$ _____	Other :	\$ _____
<b>Total Assets</b>	<b>\$ _____</b>	<b>Total Liabilities</b>	<b>\$ _____</b>
<b>Net Worth (Total Assets minus Total Liabilities)</b>			<b>\$ _____</b>



Schedule A - Cash, Checking & Savings, CD's		
Name of Bank	Account Description/Account Owner	Current Balance
		\$
		\$
		\$
		\$
<b>Total:</b>		<b>\$</b>

Schedule B - Publicly Traded Investments: Brokerage Firms, Stocks, Bonds, Mutual Funds, IRAs, 401k				
Name(s) Registered	Account Description	Shares/Amt	Retirement	Current Value
			<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
			<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
			<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
			<input type="checkbox"/> Yes <input type="checkbox"/> No	\$
<b>Total:</b>				<b>\$</b>

Schedule C - Other Assets - Vehicles, Boats, Personal Assets, Cash-value Life Insurance Owned by Signer		
Property Description	Name(s) Registered In	Current Value
		\$
		\$
		\$
		\$
<b>Total:</b>		<b>\$</b>

Schedule D - Revolving Credit: Credit Cards, Credit Lines (Do Not Include Home Equity Lines of Credit)				
To Whom Payable	Description	Commitment Amt	Monthly Pmt	Current Balance
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
<b>Total:</b>				<b>\$</b>

Schedule E - Installment Loans: Cars, Boats, Furniture, Etc.				
To Whom Payable	Description	Commitment Amt	Monthly Pmt	Current Balance
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
<b>Total:</b>				<b>\$</b>

Schedule F - Other Liabilities: Contract Debts, Lawsuits, Tax Penalties				
To Whom Payable	Description	Commitment Amt	Monthly Pmt	Current Balance
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
<b>Total:</b>				<b>\$</b>



Section 4. Real Estate Owned.	(List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.)				
	Property A	Property B	Property C	Property D	Property E
Property Type: (Personal Residence, Investments: Apartments, Commercial, Industrial, Land)					
Address					
Date Purchased					
Original Cost					
Present Market Value					
Name of Mortgage Holder					
Mortgage Balance					
Monthly Mortgage Payment					

**Section 5 - General Information**

	Applicant		Co Applicant	
Have you ever filed bankruptcy?	Yes	No	Yes	No
Have you ever had property foreclosed upon or given title or deed in lieu thereof?	Yes	No	Yes	No
Are you a party to a lawsuit?	Yes	No	Yes	No
Are there any outstanding judgements against you?	Yes	No	Yes	No
Are you a cosigner or guarantor of any other debt?	Yes	No	Yes	No
Are you currently an Executive Officer or on the Board of Directors of any Bank, Thrift, or S&L?	Yes	No	Yes	No
Are you currently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation, bond, or loan guarantee?	Yes	No	Yes	No
Are you obligated to pay alimony, child support, or separate maintenance?	Yes	No	Yes	No
Are you a US citizen?	Yes	No	Yes	No
Are you a permanent resident alien?	Yes	No	Yes	No

If YES to any of the above, please describe below:

**Section 6. Unpaid Taxes.** (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

**Signatures**

Signature (individual) \_\_\_\_\_ Date \_\_\_\_\_

Signature (Spouse) \_\_\_\_\_ Date \_\_\_\_\_