

Personal Financial Statement

Applicant (Name) _____	Joint Applicant (Name) _____
Address _____	Address: <input type="checkbox"/> same as applicant Address _____
Phone _____	Phone _____
Alternate Phone _____	Alternate Phone _____
Email _____	Email _____
Social Security No. _____	Social Security No. _____
Date of Birth _____	Date of Birth _____
Present Employer _____	Present Employer _____

Marital Status: Married Unmarried Separated
 (Note: Married applicants may apply for separate credit)

I am applying:

- For Individual Credit
- For Joint Credit with my spouse Applicant Initials: _____ Joint Applicant Initials: _____
- For Joint Credit with another, not my spouse: _____
- To guaranty the credit requested by: _____

Credit Requested: Line/Loan: \$ _____
 Purpose of Line/Loan: _____

Instructions: Follow the instructions for the box checked above.

- A. Complete and sign the Personal financial Statement. If married, include information about self and spouse (unless you do not live in a community property state or you are not requesting financial accommodations jointly).*
- B. Complete the Personal financial Statement as to self and your spouse.* Both you and your spouse must sign if you are requesting financial accommodation jointly.
- C. Each joint applicant must complete a separate Personal Financial Statement and sign it. If applicant is married, include information about his/her spouse (unless applicant does not reside in a community property state).*
- D. Complete and sign the Personal Financial Statement. If married, include information about self and spouse (unless you do not live in a community property state or you are not requesting financial accommodation jointly).*

*All assets and income of married applicants will be presumed to be community property unless you expressly indicate otherwise. See the "How Held" code at the bottom of page 3 of this form.

DATE OF VALUATIONS _____		Attach a separate sheet of paper if needed List all amounts in dollars, omit cents.	
ASSETS	AMOUNT	LIABILITIES	AMOUNT
Cash in this Bank		Accounts Payable	
Cash in Other Banks (Details)			
		Notes Payable to this Bank	
		Note Payable to Others (Schedule 7)	
Accounts Receivables		Income Taxes Payable	
Notes Receivable (Schedule 1)		Other Taxes Payable	
Deeds of Trust Owned (Schedule 2)			
Securities Owned (Schedule 3)			
Retirement Accounts			
Cash Surrender Value of Life Insurance		Loans on Life Insurance (Schedule 4)	
Real Estate (Schedule 5)		Note Payable secured by Real Estate	
Automobiles		Installment Contracts Payable	
Personal Property		Other Liabilities	
Other Assets (Details)			
		TOTAL LIABILITIES	
		NET WORTH	
	TOTAL _____	TOTAL	_____

ANNUAL INCOME		ANNUAL EXPENDITURES		CONTINGENT LIABILITIES	
Employment Income		Property Taxes		As Endorser	
Dividends		Assessments		As Guarantor	
Interest		Income & Other Taxes		Damage Claims	
Rentals		Mortgage Payments		For Taxes	
Alimony		Mortgage Interest		Other (Details)	
Child Support		Other Contract Payments			
Misc. Maintenance		Insurance			
		Living Expenses			
		Child Support			
Other Income		Alimony		<input type="checkbox"/> check here if none	
		Other Expenditures			
TOTAL		TOTAL		TOTAL	

SCHEDULE 1- Notes Receivable

Name of Debtor	Collateral	Payable	Maturity Date	Total Amount Due
		\$ Per		
		\$ Per		
		\$ Per		

SCHEDULE 2- Deeds of Trust Owned

Name of Debtor	Type of Property	1 st or 2 nd Lien	Value of Property	How Payable	Unpaid Balance
				\$ Per	
				\$ Per	
				\$ Per	

SCHEDULE 3- Securities Owned

No. Shares or Bond Amount	Description	Name on Title	How Held Code*	Amount as Carried on this Statement	Present Market Value	L=Listed U=Unlisted
TOTAL						

SCHEDULE 4- Life Insurance

Insured	Face Amount of Policy	Insurance Company	Beneficiary	Cash Value	Loans
TOTAL					

SCHEDULE 5- Real Estate (Attach additional sheet if necessary)

Address & Type of Property	Name on Title	How Held Code*	Monthly Income	Cost & Year Acquired	Present Market Value	Total Balance Owed
				\$		
				Year		
				\$		
				Year		
				\$		
				Year		
TOTAL						

SCHEDULE 6- Notes Payable Secure by Real Estate

To Whom Payable	Indicate 1 st or 2 nd Mortgage	How Payable	Interest Rate	Maturity Date	Balance Owed
		\$ Per			
		\$ Per			
		\$ Per			

SCHEDULE 7- Notes Payable

To Whom Payable	How Payable	Collateral	Interest Rate	Unpaid Balance
	\$ Per			
	\$ Per			

***HOW HELD CODE**

Revocable Trust "RT"	Irrevocable Trust "IT"	Community Property "CP"	Single Ownership "SO"	Joint Tenants "JT"	Tenants in Common "TIC"

Have you ever filed bankruptcy or had a judgment or foreclosure action brought against you? YES NO
(If YES, provide details below)

Are any assets pledged or debts secured, except as shown? YES NO

Do you have a trust? (If YES, provide the name of the trust below) YES NO

Are you required to pay alimony? If so, what is the annual alimony payment? \$

Details:

Date

Your Signature

Date

Your Spouse's Signature