# **Financial Statement**

You may apply for an extension of credit individually or jointly with another applicant. This statement and any applicable supporting schedules may be completed jointly by coapplicants if their assets and liabilities can be meaningfully and fairly presented on a combined basis, otherwise separate statements and schedules must be provided. If you are applying for an unsecured individual loan, you do not need to complete any information concerning a coapplicant unless another person will be permitted to use the account or you wish the co-applicant's or other person's income to be relied upon as the basis for repayment. For the purpose of obtaining credit from time to time with the bank, the following statement and information are furnished as complete, true, and accurate statement of the financial condition of the undersigned as of the financial statement date.

Statement of financial cond	lition as of:			_	All amount	s rounded to i	neares	t \$100
APPLICANT				CO-APPLICANT				
Full Name				Full Name				
Street Address				Street Address				
City/State/Zip				City/State/Zip				
County				County				
Since		Own	Rent	Since		O\	vn	Rent
Previous Address				Previous Address_				
City/State/Zip				City/State/Zip				
Since		Own	Rent	Since		O\	vn	Rent
Social Security #	Date of E	Birth		Social Security # _		_ Date of Birth		
Phone: Home	Work			Phone: Home		_ Work		
Employer				Employer				
Address				Address				
Position/Title				Position/Title				
Dependents (Ages)				Dependents (Ages	)			
Marital Status* Unmarr	ied Marrie	d Se	perated	Marital Status*	Unmarried	Married	Sep	erated
Address Position/Title				Address Position/Title Dependents (Ages	)			

\*Do not provide this information if your application is for individual, unsecured credit.

ASSETS
Cash (Schedule 1)
Securites (Schedule 2)
Life Insurance Cash Value (Schedule 3)
Mortgages and Contracts Held by You (Schedule 4)
Homestead (Schedule 5)
Other Real Estate (Schedule 5)
Net Profit Sharing & Pension (Schedule 6)
Retirement and IRA Accounts (Schedule 1)
Automobiles (Describe)
Personal Property
Other Assets (Describe)
TOTAL \$

LIABILITIES	
Short Term Notes Due Fin. Institutions (Schedule 7)	
Short Term Notes Due to Others (Schedule 7)	
Credit Accounts and Bills Due (Schedule 8)	
Insurance Loans (Schedule 3)	
Installment Loans and Contracts (Schedule 7)	
Mortgages on Home (Schedule 5)	
Mortgages on Other Real Estate (Schedule 5)	
Taxes	
Other Liabilities (Describe)	
TOTAL A	
TOTAL \$	

Initial \_





Contact your Banker if you need assistance with completing these schedules. Round all amounts to the nearest \$100

ANNUAL INCOME	APPLICANT	CO-APP.
Salary		
Bonuses/Commissions		
Dividends/Interest		
Net Real Estate Income		
Income from alimony, child support, or maintenance payments need not be entered unless you want it considered as a basis for repayment.		
Other (List)		

PLEASE ANSWER (YES/NO)	APPLICANT	CO-APP.
Are you a Co-Maker, Endorser or Guarantor of any other person's debt?		
Are you a defendant in any suit or legal issue?		
Have you ever gone through bankkruptcy or had a judgement against you?		
Do you have a will?		

TOTAL \$

# SCHEDULE 1 / CASH, SAVINGS, CERTIFICATES AND IRA ACCOUNTS

NAME OF BANK OR FINANCIAL INSTITUTION	CASH, CHECKING, SAVINGS, CD'S	BALANCE
	TOTAL \$	
NAME OF BANK OR FINANCIAL INSTITUTION	RETIREMENT ACCOUNT, IRA, ROTH	

TOTAL \$

# SCHEDULE 2 / SECURITIES OWNED

PAR VALUE OR NO. OF	DESCRIPTION	REGISTERED IN NAME(S) OF	LISTED OR UNLISTED	CURRENT VALUE

TOTAL \$

Initial \_\_\_\_\_





# **SCHEDULE 3 / LIFE INSURANCE**

INSURANCE COMPANY	INSURED	BENEFICIARY	FACE VALUE OF POLICY	CASH VALUE	LOANS

TOTAL \$

#### SCHEDULE 4 / RECEIVABLES DUE TO ME ON MORTGAGES AND CONTRACTS I OWN

NAME OF DEBTOR	PROPERTY DESCRIPTION	FIRST OR SECOND LIEN	DATE OF MATURITY	REPAYMENT TERMS	BALANCE DUE

TOTAL \$

# **SCHEDULE 5 / REAL ESTATE OWNED**

PROPERTY DESCRIPTION (HOME)	NAME OF CREDITOR	YEAR ACQUIRED	PURCHASE PRICE	MORTGAGE BALANCE	DATE OF MATURITY	REPAYMENT TERMS	CURRENT VALUE
OTHER PROPERTY							

TOTAL OTHER PROPERTY

TOTAL OTHER PROPERTY

## SCHEDULE 6 / PROFIT SHARING AND PENSION

NAME OF INSTITUTION	TYPE OF ACCOUNT	ACCOUNT BALANCE	AMOUNT VESTED	LOANS

TOTAL \$

## SCHEDULE 7 / INSTALLMENTS, CREDIT LINES, NOTES

SHORT TERM NOTES DUE FINANCIAL INSTITUTIONS	COLLATERAL	REPAYMENT TERMS	BALANCE DUE
		TOTAL \$	
SHORT TERM NOTES DUE OTHERS	COLLATERAL		
		TOTAL \$	
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		
INSTALLMENT LOANS AND CONTRACTS	COLLATERAL		

TOTAL \$

Initial \_\_\_\_\_





# SCHEDULE 8 / CREDIT ACCOUNTS, BILLS DUE, ALIMONY/CHILD SUPPORT, DAYCARE, etc.

NAME OF COMPANY	OR DESCRIPTION	REPAYMENT TERMS	BALANCE DUE	
		TOTAL \$		
You certify that the information provided in this statement is true and correct. So long as you owe any sums to the bank, you agree to give the bank prompt written notice of any material change in your financial condition and upon request, you agree to provide the bank with an updated personal financial statement. The bank is authorized to retain this personal financial statement whether or not credit is approved and is further authorized to verify your credit and employment history or any other information in this statement. This application does not obligate the bank to make any loan even if you meet the normal standards the bank considers in determining whether to approve or deny the application.				
Applicant's Signature	Date Co-Appli	cant's Signature	Date	



