

To Applicant: Prepare for Each Person Owning 20% or More of Business

PERSONAL FINANCIAL STATEMENT

NAME		SOCIAL SECURITY NUMBER		DATE OF BIRTH	
1		1		1	
2		2		2	

HOME ADDRESS			HOME PHONE		
1			1		
2			2		

INSTRUCTIONS					
1. Total Assets should equal Total Liabilities + Net Worth					Date of Statement:
2. Please note a jointly owned asset by placing an "X" in the Jointly Owned column (JO)					

ASSETS		JO	LIABILITIES		
Cash (Schedule 1)			\$	Real Estate Mortgage(s) (Schedule 3)	\$
Investments- Marketable Stocks & Bonds (Schedule 2)			\$	Installment Loans (Schedule 7)	\$
Accounts & Notes Receivable			\$	Credit Cards	\$
Real Estate Owned (Schedule 3)			\$	Federal Income Tax	\$
Auto	Year		\$	Other Liabilities	\$
Auto	Year		\$	Total Liabilities	\$
Cash Value Life Insurance CSVLI (Sch. 4)			\$	Net Worth	\$
Retirement/Profit Sharing Accounts (Sch 5)			\$	(Total Assets Minus Total Liabilities)	
Business Ventures (Schedule 6)			\$		
Other Assets			\$		
Total Assets			\$	Total Liabilities + Net Worth	\$

SOURCES OF INCOME					
SALARY			OCCUPATION OR TYPE OF BUSINESS		
1		\$	1		
2		\$	2		
Bonuses & Commissions		\$	Employer		How Long Employed
Dividends & Interest		\$	1	1	
Rents & Royalties		\$	2	2	
Other (Itemize)		\$	Position Held		
Total Annual Income		\$	1		
ALIMONY-CHILD SUPPORT: Inclusion of alimony, separate maintenance or child support as income is voluntary and need not be revealed if you do not wish to have it considered. If you choose to include such payments, please describe if by the court and case number, the amount and the name and address of the person obligated to pay that amount to you. If you are responsible for paying alimony, separate maintenance or child support, please give particulars of the obligation along with your other obligations.			2		
			Number of Dependents		
			1		
			2		

Other Information	Endorser or Co-maker on Notes?	1. <input type="checkbox"/> Yes <input type="checkbox"/> No	2. <input type="checkbox"/> Yes <input type="checkbox"/> No	Brief Description:
	Defendant In Any Legal Action?	1. <input type="checkbox"/> Yes <input type="checkbox"/> No	2. <input type="checkbox"/> Yes <input type="checkbox"/> No	
	Bankruptcy Ever Filed?	1. <input type="checkbox"/> Yes <input type="checkbox"/> No	2. <input type="checkbox"/> Yes <input type="checkbox"/> No	

Schedule 1	Name of Financial Institution	Type of Account	Owner	JO	If Pledged, To Whom?	Balance
Cash, Checking, Savings, CD's, MM's						

Schedule 2	Description	Registered in Name Of	# of Share or Par	Total Market Value	Where Pledged?
Investments- Stocks & Bonds				\$	
				\$	
				\$	

Schedule 3	Description & Location	Titled To	Market Value	Mortgage Lender	Balance	Mo. Pymt
Real Estate Owned					\$	
					\$	
					\$	

Schedule 4	Name of Insurance Company	Policy Owner	Beneficiary/Relationship	Amount	Loans	CSVLI
Life Insurance Carried						

Schedule 5	% Vested	Company Name	Account #	Manner of Payout	Distribution Date	Amount
Vested interest in Retirement/ Profit Sharing Accts						

Schedule 6	Business Names in which you are a principal or partner	Position or Title	Line of Business	Years in Business	Current Market Value	% of Ownership	Business Net Worth	Present Value Your %
Business Ventures								

Schedule 7	Lender	JO	Origination Date	Balance	Monthly Payment	Final Payment Date	Collateral
Loans owed to CU's, Banks, and others				\$	\$		
				\$	\$		
				\$	\$		
				\$	\$		

I (we) confirm that this financial statement is given to you by me for the purpose of obtaining credit from time to time; that I have read the same and that it is true and complete. I (we) agree that this Lender may provide information about me (us) or my (our) account(s) to others. I agree that if, in your sole opinion, this financial statement is found to be incorrect any one or more or all of my obligations to you at your sole discretion may be matured by you without demand upon formal notice to me.

I (we) authorize this Lender to disclose the information contained in this application, any credit report and personal financial information with this Lender's Servicer, solely for the purposes of underwriting this loan. Applicant authorizes the Lender to obtain a Business Credit Report through its Servicer.

Signature _____ Date _____

Signature _____ Date _____