

**Personal Financial Statement**

|  |  |
| --- | --- |
| As of Date: |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Assets** |  |  |  | **Liabilities** |  |  |  |
|  |  |  |  |  |  |  |  |
| Cash on hand and in depository institutions | $ |  |  | Accounts Payable | $ |  |  |
|  |  |  |  |  |  |  |  |
| Marketable Securities (Schedule A) | $ |  |  | Notes Payable and other loans (Schedule F) | $ |  |  |
|  |  |  |  |  |  |  |  |
| Notes Receivables (Schedule B) | $ |  |  | Real Estate Mortgage (Schedule C) | $ |  |  |
|  |  |  |  |  |  |  |  |
| Real Estate (Schedule C) | $ |  |  | Other Liabilities (Schedule G) | $ |  |  |
|  |  |  |  |  |  |  |  |
| Proprietary Interests & other securities (Schedule D) | $ |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| Retirement Funds & other assets (Schedule E) | $ |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **Total Assets** | $ |  |  | **Total Liabilities** | $ |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  | **Net Worth** | $ |  |  |
|  |  |  |  |  |  |  |  |

I/We hereby apply for the loan or credit described in this application. I/We certify that I/we have made no misrepresentation in this loan application or in any related documents, that all information is true and complete, and that I/we did not omit any important information. I/We agree that any property securing the loan or credit will not but used for any illegal or restricted purpose. Lender is authorized to verify with other parties and to make any investigation or my/our credit, either directly or through any agency employed by Lender for that purpose. Lender may disclose to any other interested parties information as to Lender’s experience or transactions with my/our account. I/We understand that Lender will retain this application and any other credit information Lender receives, even if no loan or credit is granted. These representations and authorizations extend not only to Lender, but also to any insurer of the loan and to any investor to whom Lender may sell all or any part of the loan. I/We further authorize Lender to provide to any such insurer or investor any information and documentation that they may request with respect to my/our application, credit or loan.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date |  |  | Your Signature | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| Date |  |  | Co-Credit Party Signature | | |  |  |  |

**Questions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Applicant** | | **Co-Applicant** | |  | **Explanation** |
| Yes | No | Yes | No |  |  |
|  |  |  |  | Are there any outstanding judgments against you? |  |
|  |  |  |  | Have you ever been declared bankrupt? |  |
|  |  |  |  | Have you had property foreclosed upon or given title or deed in lieu thereof in the last 7 years? |  |
|  |  |  |  | Are you party to a lawsuit? |  |
|  |  |  |  | Are you obligated on any loan resulting in judgment, foreclosure or title transfer? |  |
|  |  |  |  | Are delinquent, in default on any Federal debt, financial obligation, bond, or loan guarantee? |  |
|  |  |  |  | Are you obligated to alimony, child support or separate maintenance? |  |
|  |  |  |  | Is any part of the down payment borrowed? |  |
|  |  |  |  | Are you a co-maker or an endorser on a loan? |  |
|  |  |  |  | Have you ever had merchandise repossessed? |  |
|  |  |  |  | Have you ever been denied credit with us? |  |
|  |  |  |  | Are you a U.S. citizen? |  |
|  |  |  |  | If no, are you a resident alien? |  |
|  |  |  |  | If no, are you a non-resident alien? |  |

**Supporting Schedules**

**Schedule A - Securities**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **No. of Shares (Stock)**  **Face Value (Bonds)** | **Description** | **Owners** | **Where Held** | **Market Value** | **Pledged**  **( Yes or No)** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| **Total** | | | | **$** |  |

**Schedule B – Notes Receivables**

|  |  |
| --- | --- |
| **Description** | **Current Balance** |
|  |  |
|  |  |
|  |  |
|  |  |
| **Total** | **$** |

**Schedule C – Real Estate**

**Personal Residence(s)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Property Address** | **Market Value** | **Present Loan Balance** | **Monthly Payment** | **Percent Owned** | **Annual Income** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Investment Property**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |

**Schedule D – Proprietary Interests and Other Securities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Company** | **Legal Form of Company** | **Nature of Business** | **Percent Ownership** | **Current Value** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Total** | | | | **$** |

**Schedule E – Retirement Funds and Other Assets**

|  |  |  |
| --- | --- | --- |
| **Description** | **Basis for Valuation** | **Current Value** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total** | | **$** |

**Schedule F- Notes Payable and Other Loans**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Creditor** | **Description & Value of Collateral** | **Maturity Date** | **Current Balance** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Total** | | | **$** |

**Schedule G – Other Liabilities**

|  |  |  |
| --- | --- | --- |
| **Description** | **Creditor** | **Amount** |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total** | | **$** |

**Contingent Liabilities**

In addition to the liabilities listed on the Financial Statement, have you endorsed, guaranteed, or become otherwise indirectly or contingently liable for the debts of others or through a pending lawsuit?

|  |  |
| --- | --- |
| Yes |  |
| No |  |

If yes, complete the following:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Debtor or Obligor** | **Name of Creditor or Obligee** | **Description and Value of Collateral** | **Date Due** | **Current Principal Balance** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Total** | | | | **$** |