



PERSONAL FINANCIAL STATEMENT

Complete this form for each Principal and any person or entity providing a guaranty on the loan. Principal is defined as one or more natural persons having a majority ownership interest in the borrower.

Name: _____ Business Phone #: _____

Residence Address: _____ Residence Phone #: _____

E-Mail Address: _____ Fax Number: _____

City, State & Zip Code: _____

Business Name of Applicant/Borrower: _____

ASSETS	LIABILITIES
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Cash on Hand & in Banks.....	\$ _____	Accounts Payable.....	\$ _____
Savings Accounts.....	\$ _____	Notes Payable to Banks & Others.....	\$ _____
IRA or Other Retirement Account.....	\$ _____	<i>(Describe in Section 2)</i>	
Accounts & Notes Receivable.....	\$ _____	Installment Account (Auto).....	\$ _____
Life Insurance - Cash Surrender Value Only\$ _____		Mo. Payments: \$ _____	
<i>(Complete Section 8)</i>		Installment Account (Other).....	\$ _____
Stocks & Bonds.....	\$ _____	Mo. Payments: _____	\$ _____
<i>(Describe in Section 3)</i>		Loan on Life Insurance.....	\$ _____
Real Estate.....	\$ _____	Mortgages on Real Estate.....	\$ _____
<i>(Describe in Sections 4 and 4a)</i>		<i>(Describe in Sections 4 and 4a)</i>	
Automobile - Present Value.....	\$ _____	Unpaid Taxes.....	\$ _____
Other Personal Property.....	\$ _____	<i>(Describe in Section 6)</i>	
<i>(Describe in Section 5)</i>		Other Liabilities.....	\$ _____
Other Assets.....	\$ _____	<i>(Describe in Section 7)</i>	
<i>(Describe in Section 5)</i>		Total Liabilities.....	\$ _____
Total.....	\$ _____	Net Worth.....	\$ _____
		Total.....	\$ _____

SECTION 1. Source of Income	Contingent Liabilities
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Salary.....	\$ _____	as Endorser or Co-Maker.....	\$ _____
Net Investment Income.....	\$ _____	Legal Claims & Judgments.....	\$ _____
Real Estate Income.....	\$ _____	Provision for Federal Income Tax.....	\$ _____
Other Income <i>(Describe below)*</i>	\$ _____	Other Special Debt.....	\$ _____

Description of Other Income in Section 1

***Alimony or child support payments need to be disclosed in "Other Income" unless it is desired to have such payments counted towards total income.**

Section 2. Notes Payable to Bank and Others (Use attachments if necessary. Each attachment must be identified as part of this statement & signed)

Name & Address of Note holder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed
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Section 3 Stocks & Bonds (Use attachments if necessary). Each attachment must be identified as a part of this statement & signed).

Number of shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

Section 4 Personal Residence(s)

Ownership Name _____
 Type of Property _____
 Address _____
 Date Purchased _____
 Original Cost _____
 Present Market Value _____
 Mortgage Holder Name _____
 Mortgage Holder Address _____
 Mortgage Account Number _____
 Mortgage Balance _____
 Amount of Pmt per Mo/Yr _____
 Status of Mortgage _____

Section 4a Investment Real Estate

Please complete the attached schedule (if applicable) _____

Section 5 Other Personal Property & Other Assets (Describe, and if any is pledged as security, state name & address of lien holder, amount of lien, terms of payment, and if delinquent, describe delinquency).

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).

Section 7 Other Liabilities (Describe in detail).

Section 8 Life Insurance Held (Give face amount & cash surrender value of policies - name of insurance company and beneficiaries).

I authorize **The Credit Union** to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S.C.1001).

Signature: _____ Date: _____ SS# _____

Signature: _____ Date: _____ SS# _____