

# 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 co-applicant 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 condition as of: \_\_\_\_\_

All amounts rounded to nearest \$100

## APPLICANT

Full Name \_\_\_\_\_

Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

County \_\_\_\_\_

Since \_\_\_\_\_ Own Rent

Previous Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Since \_\_\_\_\_ Own Rent

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Phone: Home \_\_\_\_\_ Work \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

Position/Title \_\_\_\_\_

Dependents (Ages) \_\_\_\_\_

Marital Status\* Unmarried Married Seperated

## CO-APPLICANT

Full Name \_\_\_\_\_

Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

County \_\_\_\_\_

Since \_\_\_\_\_ Own Rent

Previous Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Since \_\_\_\_\_ Own Rent

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Phone: Home \_\_\_\_\_ Work \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

Position/Title \_\_\_\_\_

Dependents (Ages) \_\_\_\_\_

Marital Status\* Unmarried Married Seperated

*\*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)	
<b>TOTAL \$</b>	

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)	
<b>TOTAL \$</b>	

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		

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-Applicant's Signature    Date