

## INDIVIDUAL FINANCIAL STATEMENT

LOAN AMOUNT REQUESTED \$ \_\_\_\_\_ PURPOSE: \_\_\_\_\_

CHECK AS APPLICABLE: Applicant is applying for this loan:

- Individually, without a co-signer or guaranty of a relative or other person(s) or entity. NOTE: Applicant, if married may apply for a separate account
- Jointly, with the co-signature or guaranty of one or more persons or entities (including any existing guarantors).

### APPLICANT INFORMATION:

Name: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Occupation: \_\_\_\_\_ No. of Years: \_\_\_\_\_

### CO-APPLICANT INFORMATION:

Name: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Occupation: \_\_\_\_\_ No. of Years: \_\_\_\_\_

PLEASE INDICATE OR PROVIDE EXPLANATION RELATING TO ANY ASSETS OWNED JOINTLY OR BY A TRUST OR LIABILITIES OWED WITH OTHERS. (ATTACH SCHEDULES AND EXPLANATORY NOTES IF NECESSARY.)

### STATEMENT OF FINANCIAL CONDITION AS OF \_\_\_\_\_

Are any of the assets listed on this statement held under a Trust Agreement?  Yes  No

ASSETS		AMOUNT	LIABILITIES		AMOUNT	
Cash	SCHEDULE A	With Us	Notes & Loans Payable [Other Than Real Estate]	SCHEDULE G		
		Other Banks		Notes Payable to Bank		
Stock & Bonds	SCHEDULE B	Market Securities	Accounts & Bills Payable		Notes & Loans Payable (Other)	
		Others		Credit Cards		
Life Insurance	SCHEDULE C	Cash Value	Taxes Owed		Other	
	SCHEDULE D		Real Estates Notes & Contracts Payable	SCHEDULE E	Residence(s)	
Notes Receivable					Other	
Real Estate	SCHEDULE E	Residence(s)	Contingent Liabilities	SCHEDULE H		
		Other				
Other Assets & Personal Prop.	SCHEDULE F					
TOTAL ASSETS			\$	TOTAL LIABILITIES		\$
NET WORTH			(DIFFERENCE BETWEEN TOTAL ASSETS & TOTAL LIABILITIES)			\$

SCHEDULE A			CASH LOCATION AND STATUS OF BANK ACCOUNTS		
CKNG	CD'S	SVNG	Bank and Branch where Carried	Balance	Date CD Matures
TOTAL				\$	

SCHEDULE B		STOCKS AND BONDS (Include Interests In Any Closely Held Business)		
Description	No. Shares	Registered in Name of		Total Value
TOTAL				\$

SCHEDULE C		INSURANCE			
Insured	Primary Beneficiary	Face Amount	Loans on Policy	Cash Value	Name of Company
<b>TOTAL</b>		\$	\$	\$	

SCHEDULE D		ACCOUNTS AND NOTES RECEIVABLE		
Due From	Maturity Date	Terms		Balance Due
		\$	Per	
		\$	Per	
		\$	Per	
		\$	Per	
		\$	Per	
<b>TOTALS</b>		\$		\$

SCHEDULE E		REAL ESTATE							
Parcel No.	Address/Location	Mortgagee or Lien Holder	Date Acquired	Purchase Price	Present Value	Balance Due	Monthly Payments	Rate	Taxes
1									
2									
3									
4									
5									
<b>Total</b>									

SCHEDULE F		OTHER ASSETS AND PERSONAL PROPERTY						
Automobiles		Value	Rec. Vehicles and Boats		Value	Personal Property		Value
Yr.	Make:	Yr.	Make:	Yr.	Make:	Furniture		
Yr.	Make:	Yr.	Make:	Yr.	Make:	Jewelry		
Yr.	Make:	Other:		Yr.	Make:	Other		
<b>Subtotal</b>		\$	<b>Subtotal</b>		\$	<b>Subtotal</b>		\$
<b>Total Other Assets</b>						\$		

SCHEDULE G		NOTES AND LOANS PAYABLE TO BANKS AND OTHERS (other than real estate)			
Payable To	Collateral	Maturity Date	Terms		Balance Due
			\$	Per	
			\$	Per	
			\$	Per	
			\$	Per	
<b>TOTAL</b>					\$

SCHEDULE H		CONTINGENT LIABILITIES			
Payable To	Persons Liable	Collateral	Terms		Balance Due
			\$	Per	
			\$	Per	
			\$	Per	
			\$	Per	
<b>TOTAL</b>					\$

**SIGNATURES:**

I (We) hereby affirm that the foregoing information contained in this financial statement is presented for the purpose of obtaining credit as of the date indicated and is true, complete and correct. I understand Lender is relying on this statement of my financial condition in making loan(s) to me. I hereby certify that this is a true statement of my financial condition as of the date of valuation. All credit facilities, encumbrances of assets and contingent liabilities, including standby letters of credit, endorsements or guaranties, are fully disclosed. I hereby represent that I am not a party to any bankruptcy proceedings. If there are any exceptions to the foregoing representation, they are fully disclosed to you in attached written exhibits. Lender is authorized to make any investigation of my credit or employment status either directly or through any agency employed by Lender for that purpose. Lender may disclose to any other interested parties Lender's experience with this account. I agree to inform the Lender immediately of any matter, which will cause any significant change in my financial condition. I understand that Lender will retain this financial statement whether or not credit is granted.

**I HAVE READ, UNDERSTAND AND AGREE TO MAKE THESE REPRESENTATIONS AND WARRANTIES.**

Applicant's Signature

Date

Co-Applicant's Signature

Date