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Presented To:



*Personal Financial Statement*

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Date: \_\_\_\_\_

*If I have any questions regarding the completion of this form, I should contact my representative at the bank.*

*I may apply for a credit extension, loan or other financial accommodation alone or together with someone else, ("co-applicant"). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this required statement and any supporting schedules jointly. Otherwise, separate forms and schedules are required.*

**APPLICANT**

Name \_\_\_\_\_

Social Security number \_\_\_\_\_

Address \_\_\_\_\_

Time of Residence \_\_\_\_\_

Telephone number \_\_\_\_\_

Date of birth \_\_\_\_\_

Present employer \_\_\_\_\_

Position \_\_\_\_\_

Address \_\_\_\_\_

Time of Employer \_\_\_\_\_

Business phone \_\_\_\_\_

Loan purpose \_\_\_\_\_

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**CO-APPLICANT**

Name \_\_\_\_\_

Social Security number \_\_\_\_\_

Address \_\_\_\_\_

Time of Residence \_\_\_\_\_

Telephone number \_\_\_\_\_

Date of birth \_\_\_\_\_

Present employer \_\_\_\_\_

Position \_\_\_\_\_

Address \_\_\_\_\_

Time of Employer \_\_\_\_\_

Business phone \_\_\_\_\_

Loan purpose \_\_\_\_\_

- Round all amounts to the nearest \$100
- Attach separate sheet if you need more space to complete detail schedule

Date of valuation			
<i>Assets (assets you own)</i>		<i>Liabilities (debts you owe)</i>	
	<i>Amount</i>		<i>Amount</i>
<i>Cash in this bank: Checking</i>		<i>Loans payable to banks (schedule 7)</i>	
<i>Savings</i>		<i>Loans payable to others (schedule 7)</i>	
<i>C.D.s</i>		<i>Installment contracts payable (schedule 7)</i>	
<i>IRA</i>		<i>Amounts due to dept. stores and others</i>	
<i>Cash in other banks</i>		<i>Credit cards (MasterCard, Visa, &amp; others)</i>	
<i>Due from friends, relatives and others (schedule 1)</i>		<i>Income taxes payable</i>	
<i>Mortgage and contracts for deed owned (schedule 2)</i>		<i>Other taxes payable</i>	
<i>Securities owned/Retirement accounts (schedule 3)</i>			
<i>Cash surrender value of life insurance (schedule 4)</i>		<i>Loans on life insurance (schedule 6)</i>	
<i>Homestead (schedule 5)</i>			
<i>Other real estate owned (schedule 5)</i>		<i>Mortgage on homestead (schedule 6)</i>	
<i>Automobiles (year, make, model)</i>		<i>Mortgage or liens on other real estate owned (schedule 6)</i>	
		<i>Contract for deed (schedule 6)</i>	
<i>Personal property</i>		<i>Other liabilities (detail)</i>	
<i>Other assets (detail)</i>			
		<b>TOTAL LIABILITIES</b>	
		<i>Net worth (total assets less total liabilities)</i>	
	<b>TOTAL</b>		<b>TOTAL</b>

<i>Annual income</i>	<i>Applicant</i>	<i>Co-applicant</i>	<i>Contingent liabilities</i>	<i>Amount</i>
<i>Salary</i>			<i>As endorser</i>	
<i>Commissions</i>			<i>As guarantor</i>	
<i>Dividends</i>			<i>Lawsuits</i>	
<i>Interest</i>			<i>For taxes</i>	
<i>Rentals</i>			<i>Other (detail)</i>	
<i>Alimony, child support or maintenance (you need not show this unless you wish us to consider it).</i>				
<i>Other</i>				
			<input type="checkbox"/> Check here if "none"	
<b>TOTAL INCOME</b>			<b>TOTAL CONTINGENT LIABILITIES</b>	

**SCHEDULE 1 DUE FROM FRIENDS, RELATIVES AND OTHERS**

<i>Name of debtor</i>	<i>Owed to</i>	<i>Collateral</i>	<i>How payable</i>	<i>Maturity date</i>	<i>Unpaid balance</i>
			\$ per		
			\$ per		
			\$ per		
<b>TOTAL</b>					

**SCHEDULE 2 MORTGAGE AND CONTRACTS FOR DEED OWNED**

<i>Name of debtor</i>	<i>Type of property</i>	<i>1st or 2nd lien</i>	<i>Owed to</i>	<i>How payable</i>	<i>Unpaid balance</i>
				\$ per	
				\$ per	
				\$ per	
<b>TOTAL</b>					



	<b>APPLICANT</b>		<b>CO-APPLICANT</b>	
Have I ever gone through bankruptcy or had a judgment against me?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are any assets pledged or debts secured except as shown?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have I made a Will?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Number of dependents (if none, check "None")	_____ <input type="checkbox"/> None		_____ <input type="checkbox"/> None	
Marital status (answer only if this financial statement is provided in connection with a request for secured credit, applicant is seeking a joint account with spouse, or applicant or co-applicant is a resident of Arizona, New Mexico, Texas, or Wisconsin)	<input type="checkbox"/> Married		<input type="checkbox"/> Married	
	<input type="checkbox"/> Separated		<input type="checkbox"/> Separated	
	<input type="checkbox"/> Unmarried		<input type="checkbox"/> Unmarried	

*(Unmarried includes single, divorced, widowed)*

The foregoing statement, submitted for the purpose of obtaining credit, is true and correct in every detail and fairly shows my/our financial condition at the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition occurring before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve the credit in connection with which it is submitted. You are authorized to check my/our credit and employment history or any other information contained herein.

**THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.**

\_\_\_\_\_  
Date

\_\_\_\_\_  
My signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-applicant signature (if you are requesting the financial accommodation jointly)

**NOTICE TO ARIZONA AND NEW MEXICO APPLICANTS ONLY:**  
 I am applying for individual credit as a sole and separate debt.

**NOTICE TO OHIO APPLICANTS ONLY:** The Ohio laws against discrimination require that all creditors make credit equally available to all credit worthy customers, and that credit reporting agencies maintain separate credit histories on each individual upon request. The Ohio civil rights commission administers compliance with this law.

**NOTICE TO WISCONSIN MARRIED APPLICANTS ONLY:** No provision of any marital property agreement, unilateral statement under §766.59, Wis. Stats., or court decree under §766.70, Wis. Stats., adversely affects the interest of the creditor unless the creditor, prior to the time the credit is granted or an open-end credit plan is entered into, is furnished a copy of the agreement, statement or court decree or has actual knowledge of the adverse provision.