

To Applicant: Prepare for Each Person Owning 20% or More of Business

PERSONAL FINANCIAL STATEMENT

NAME		SOCIAL SECURITY NUMBER		DATE OF BIRTH	
1		1		1	
2		2		2	
HOME ADDRESS			HOME PHONE		
1		1			
2		2			

INSTRUCTIONS

1. Total assets should equal Total Liabilities + Net Worth Date of Statement:

2. Please note a jointly owned asset by placing an "x" in the jointly Owned column (JO)

ASSETS		JO	LIABILITIES		
Cash (Schedule 1)			\$	Real Estate Mortgage(s) (Scheduled 3)	\$
Investments					
Marketable Stocks & Bonds (Schedule 2)			\$	Installment Loans (Schedule 2)	\$
Accounts & Notes Receivable			\$	Credit Cards	\$
Real Estate Owned (Schedule 3)			\$	Federal Income Tax	\$
Auto	Year		\$	Other Liabilities	\$
Auto	Year		\$	Total Liabilities	\$
Cash Value Life Insurance CSVLI (Sch. 4)			\$	Net Worth	\$
Retirement/Profit Sharing Accounts (Sch. 5)			\$	(Total Assets Minus Total Liabilities)	
Business Ventures (Schedule 6)			\$		
Other Assets			\$		
Total Assets			\$	Total Liabilities + Net Worth	\$

SOURCE OF INCOME		JO	LIABILITIES		
SALARY			OCCUPATION OR TYPE OF BUSINESS		
1		\$	1		
2		\$	2		
Bonuses & Commissions		\$	Employer	How Long Employed	
Dividends & Interest		\$	1	1	
Rents & Royalties		\$	2	2	
Other (Itemize)		\$	Position Held		
Total Annual Income		\$	1		
ALIMONY-CHILD SUPPORT: Inclusion of alimony, separate maintenance or child support as income is voluntary and need not be revealed if you do not wish to have it considered. If you choose to include such payments, please describe if by the court and case number, the amount and the name and address of the person obligated to pay that amount to you. If you are responsible for paying alimony, separate maintenance or child support, please give the particulars of the obligation along with your other obligations.			2		
		Number of Dependents			
			1		
			2		

Other Information	Endorser or Co-Maker on Notes?						Brief Description:
	1	Yes	No	2	Yes	No	
	Defendant in any legal action?						
	1	Yes	No	2	Yes	No	
Bankruptcy Ever Filed?							
1	Yes	No	2	Yes	No		

Schedule 1	Name of Financial Institution	Type of Account	Owner	JO	If Pledged, To Whom?	Balance
Cash, Checking, Savings, CD/s, MM's						\$
						\$
						\$
						\$

Schedule 2	Description	Registered in Name Of	# of Share or Par	Total Market Value	Where Pledged?
Investments- Stocks & Bonds				\$	
				\$	
				\$	

Schedule 3	Description and Location	Titled to	Market Value	Mortgage Lender	Balance	Monthly Payment
Real Estate Owned			\$		\$	\$
			\$		\$	\$
			\$		\$	\$

Schedule 4	Name of Insurance Company	Policy Owner	Beneficiary/ Relationship	Amount	Balance	CSVLI
Life Insurance Carried				\$	\$	
				\$	\$	
				\$	\$	

Schedule 5	% Vested	Company Name	Account Number	Manner of Payout	Distribution Date	Amount
Vested Interest in Retirement/ Profit Sharing Accounts						\$
						\$
						\$
						\$
						\$

Schedule 6	Business Names in which you are a Principal Partner	Position or Title	Line of Business	Yrs. in Bus.	Current Market Value	% of Ownership	Business Net Worth	Present Value of Your %
Business Ventures					\$		\$	
					\$		\$	
					\$		\$	
					\$		\$	

Schedule 7	Lender	JO	Origination Date	Balance	Monthly Payment	Final Payment	Collateral
Loans				\$	\$	\$	
				\$	\$	\$	
				\$	\$	\$	
				\$	\$	\$	

I (we) confirm that this financial statement is given to you by me (us) for the purpose of obtaining credit from time to time; that I (we) have read the same and that it is true and complete. I (we) agree that this Credit Union may provide information about me (us) or my (our) account(s) to others. I (we) agree that if, in your sole opinion, this financial statement is found to be incorrect any one or more or all of my (our) obligations to you at your sole discretion may be matured by you without demand upon formal notice to me (us).

I (we) authorize this Credit Union to disclose the information contained in this application, any credit report and personal financial information with his Credit Union's Servicer, solely for the purpose of underwriting this loan. Applicant Authorizes the Credit Union to obtain a Business Credit Report through its Servicer.

Signature _____ Date: _____
 Signature _____ Date: _____