



## PERSONAL FINANCIAL STATEMENT

**FOR SECURITY PURPOSES, DO NOT RETURN THE COMPLETED STATEMENT VIA E-MAIL**

CONFIDENTIAL - PLEASE DO NOT LEAVE ANY QUESTIONS UNANSWERED

For the purpose of procuring and maintaining credit from time to time in any form whatsoever with the above name Bank, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of his/her financial condition on the following date, and agree that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against him/her, the undersigned will immediately and without delay notify the said Bank, and unless the Bank is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned as of the close of business.

Full Name	SSN	Full Name	SSN
Street Address		Street Address	
City, State		City, State	
Zip		Zip	
Since	Owned or Rented	Since	Owned or Rented
Previous Address if less than 5 years		Previous Address if less than 5 years	
City/State/Zip		City/State/Zip	
Since	Owned or Rented	Since	Owned or Rented
Birth Date		Birth Date	
Dependents excluding self		Dependents excluding self	
Phone:	Residence	Phone:	Residence
	Work		Work
Employer	Since	Employer	Since
Address		Address	
Position/Title		Position/Title	
E-Mail Address		E-Mail Address	

**Data needs to be entered in Schedules 1 – 11 in order for the Assets and Liabilities section to calculate**

ASSETS		LIABILITIES	
Cash Schedule (Schedule 1)	\$ -	Insurance Loans (Schedule 3)	\$ -
Securities (Schedule 2)	\$ -	Profit Sharing and Pension (Schedule 5)	\$ -
Life Insurance Cash Value (Schedule 3)	\$ -	Retirement Accounts (Schedule 5)	\$ -
Mortgages and Contracts Held by You (Schedule 4)	\$ -	Mortgages on Home (Schedule 6)	\$ -
Retirement Accounts, Include IRA Accounts (Schedule 5)	\$ -	Mortgages on Other Real Estate (Schedule 6)	\$ -
Profit Sharing & Pension (Schedule 5)	\$ -	Short Term Notes Due Financial Institutions (Schedule 8)	\$ -
Primary Residence (Schedule 6)	\$ -	Short Term Notes Due Others (Schedule 8)	\$ -
Other Real Estate (Schedule 6)	\$ -	Installment Loans and Contracts (Schedule 8)	\$ -
Automobiles (Schedule 7)	\$ -	Credit Account and Bills Due (Schedule 9)	\$ -
Personal Property (Schedule 7)	\$ -	Contingent Liabilities (Schedule 10)	\$ -
Other Assets (Schedule 7)	\$ -	Other Liabilities (Schedule 11)	\$ -
<b>TOTAL Assets</b>	<b>\$ -</b>	<b>TOTAL Liabilities</b>	<b>\$ -</b>
		<b>Net Worth</b>	<b>\$ -</b>

Statement of Financial Condition as of \_\_\_\_\_, 20\_\_\_\_

ANNUAL INCOME	NAME	NAME
Salary		
Commissions		
Dividends		
Interest		
Rentals		
Alimony, Child Support or Maintenance <small>(you need not show this unless you wish us to consider it)</small>		
Other		
<b>TOTAL INCOME</b>	<b>\$ -</b>	<b>TOTAL INCOME</b>
		<b>\$ -</b>

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**Schedule 1 / Cash, Savings & Certificates of Deposit**

Name of Bank or Financial Institution	How Owned JT, IND, Trust	Type of Account	Account Balance
<b>TOTAL \$</b>			<b>\$ -</b>

**Schedule 2 / Securities Owned or Attach Brokerage Statement**

No. of Shares	Description	Registered in Names of	Listed/Unlisted	Current Market Value
<b>TOTAL \$</b>				<b>\$ -</b>

**Schedule 3 / Life Insurance**

Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans
<b>TOTAL \$</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

**Schedule 4 / Receivables Due to Me on Mortgages on Contracts I Own**

Name of Debtor	Description of Property	1st or 2nd Lien	Date of Maturity	Repayment Terms	Balance Due
<b>TOTAL \$</b>					<b>\$ -</b>

**Schedule 5 / Profit Sharing and Pension**

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
<b>TOTAL \$</b>			<b>\$ -</b>	<b>\$ -</b>

**Schedule 5 / Retirement Accounts and IRA Accounts**

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
<b>TOTAL \$</b>			<b>\$ -</b>	<b>\$ -</b>

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**Schedule 6 / Primary Real Estate Owned**

Property Type / Address	Year Acquired	Name of Creditor	Purchase Price	Mortgage Balance	Maturity Date	How Owned / TRUST	JT / IND	Repayment Terms	Current Market Value
Primary									
<b>TOTAL \$</b>								\$	-

**Schedule 6 / Other Real Estate Owned**

Property Type / Address	Year Acquired	Name of Creditor	Purchase Price	Mortgage Balance	Maturity Date	How Owned / TRUST	JT / IND	Repayment Terms	Current Market Value	
<b>TOTAL \$</b>			\$					-		
<b>TOTAL \$</b>								\$	-	

**Schedule 7 / Other Assets, Vehicles, and Personal Property**

Automobiles (Describe)		Other Assets (Describe)	

**Schedule 8 / Short Term Notes Due Financial Institutions**

Name of Creditor	Collateral	Maturity Date	Repayment Terms	Balance Due
			per	
			per	
			per	
			per	
			per	
<b>TOTAL \$</b>				\$
				-

Insurance Company \_\_\_\_\_ Agent \_\_\_\_\_ Phone \_\_\_\_\_

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**Schedule 8 / Short Term Notes Due to Others**

Name of Creditor	Collateral	Maturity Date	Repayment Terms	Balance Due
			per	
			per	
			per	
			per	
			per	
<b>TOTAL \$</b>				<b>\$ -</b>

**Schedule 8 / Installment Loans and Contracts**

Name of Creditor	Collateral	Maturity Date	Repayment Terms	Balance Due
			per	
			per	
			per	
			per	
<b>TOTAL \$</b>				<b>\$ -</b>

**Schedule 9 / Credit Accounts, Bills Due, Alimony / Child Support, Daycare, Etc.**

Name of Company	Repayment Terms	Balance Due
	per	
	per	
	per	
	per	
	per	
<b>TOTAL \$</b>		<b>\$ -</b>

**Schedule 10 / Contingent Liabilities**

Contingent Liabilities (Describe)		Amount
As Endorser		
As Grantor		
Lawsuits		
For Taxes		
Other (Detail)		
<b>TOTAL \$</b>		<b>\$ -</b>

**Schedule 11 / Other Liabilities**

Other Liabilities (Describe)	Amount	
<b>TOTAL \$</b>		<b>\$ -</b>

Name of Accountant \_\_\_\_\_

Attorney \_\_\_\_\_

In the last 7 years, have you had any unsatisfied judgments or declared bankruptcy?.....

Yes                      No

\_\_\_\_\_

In the last 7 years, have you had property foreclosed upon or given title or deed in lieu thereof?.....

\_\_\_\_\_

Do you have any unused credit facilities at other financial institutions?.....

\_\_\_\_\_

Have you prepared a will and / or estate plan? What Year?.....

Year

\_\_\_\_\_

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 and verify by whatever means it deems necessary your credit and employment history or any other information in this statement. This statement 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 credit.

\_\_\_\_\_  
Signature                      Date

\_\_\_\_\_  
Signature                      Date