

**PERSONAL FINANCIAL STATEMENT:**

(Date Here)

Statement Date

Name

Home Address

Home Telephone

Business Phone

Business or Occupation

Have you been through bankruptcy in the past 10 years? If Yes, Explain

Are any assets pledged?  YES  NO

To:



Soc. Sec. No.

Date of Birth

City

State

Zip

Spouse Name

No. of Dependents

Name of venture(s) of which you are Partner or Officer

**SECTION ONE**

**Note: Complete All of Section Two Before Section One**

**ASSETS**

**LIABILITIES AND NET WORTH**

Cash On Hand (Schedule A)	\$	Debts Payable (Schedule E)	\$
Cash Value of Life Insurance (Schedule B)		Loans on Life Insurance (Schedule B)	
Marketable Securities (Schedule C)		Real Estate Debt (Schedule F)	
Accounts & Notes Receivable (Schedule D)		Unpaid Income Taxes Due	
IRA / Retirement Accounts		Other Term Notes Payable	
		Other Debt - Itemize	
Real Estate Owned (Schedule F)			
Non-Marketable Securities			
Automobiles			
Household Goods			
Other Personal Property			
Other Assets - Itemize			
		TOTAL LIABILITIES	\$
		NET WORTH	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES & NET WORTH	\$

**MONTHLY INCOME AND EXPENSES**

Salary	\$	Rent or Home Payment	\$
Bonus and Commissions		Food and Utilities	
Dividends and Interest		Incidentals	
Real Estate Income		Avg. Amount Paid on Open Accounts	
Retirement Income		Insurance payments	
Other Income		Other payments	
TOTAL INCOME	\$	TOTAL EXPENSES	\$

**CONTINGENT LIABILITIES**

Please provide the following information regarding your contingent liabilities. A contingent liability is any debt your are or may be required to pay as a guarantor, endorser or co-maker, legal claims or judgements, or special expenses such as child support, alimony, etc.

Loan In Name Of	Amount	Financed By	Limited %
	\$		

For the purpose of procuring and maintaining credit from time to time in any form whatsoever with the above named Credit Union, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of its 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 it, the undersigned will immediately and without delay notify the said Credit Union. I authorize Lender or its agents to verify the information obtained in this statement & obtain additional information concerning my financial condition.

Note: Any willful misrepresentation could result in a violation of Federal Law (Sec. 18 U.S.C. 1014)

Date

Signature