

PERSONAL FINANCIAL STATEMENT

DATE: _____, 20__

Individual – If you check this box, provide Financial Information only about yourself.

Joint, with _____ Relationship _____ If you check this box, provide Financial Information about yourself and the other person. Initials _____

INDIVIDUAL			JOINT		
NAME			NAME		
Social Security #	DOB	Yrs. School	Social Security #	DOB	Yrs. School
Home Phone	Cell Phone		Home Phone	Cell Phone	
Email	Dependants no. _____ ages: _____		Email	Dependants no. _____ ages: _____	
Present Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.			Present Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.		
Mailing Address, if different from Present Address			Mailing Address, if different from Present Address		
<i>If residing at present address for less than two years, complete the following:</i>					
Former Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.			Former Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.		

INDIVIDUAL		EMPLOYMENT INFORMATION		JOINT	
Name & Address of Employer <input type="checkbox"/> Self Employed	Yrs. on this job	Yrs. employed in this line of work/profession	Name & Address of Employer <input type="checkbox"/> Self Employed	Yrs. on this job	Yrs. employed in this line of work/profession
Position/Title/Type of Business	Business Phone (incl. area code)		Position/Title/Type of Business	Business Phone (incl. area code)	

MONTHLY INCOME AND COMBINED HOUSING EXPENSES INFORMATION			
	Individual	Joint	Total
Gross Monthly Income			
Base Empl. Income	\$	\$	\$
Overtime			
Bonuses			
Commissions			
Dividends/Interest			
Net Rental Income			
Other (before completing, see the notice in "describe other income," below)			
Total	\$	\$	\$

* Self Employed Individual(s) may be required to provide additional documentation such as tax returns and financial statements.

Schedule of Real Estate Owned (if additional properties are owned, use continuation sheet)

Property Address (enter S if sold, PS if pending sale or R if rental being held for income) ▼	Type of Property	Present Market Value	Amount of Mortgages & Liens	Gross Rental Income	Mortgage Payments	Insurance, Maintenance, Taxes & Misc.	Net Rental Income
		\$	\$	\$	\$	\$	\$
	Totals	\$	\$	\$	\$	\$	\$

List any additional names under which credit has previously been received and indicate appropriate creditor name(s) and account number(s):

Alternate Name	Creditor Name	Account Number

This Statement and any applicable supporting schedules may be completed jointly by both married and unmarried Co-Borrowers if their assets and liabilities are sufficiently joined so that the Statement can be meaningfully and fairly presented on a combined basis; otherwise, separate Statements and Schedules are required. If the Co-Borrower section was completed about a non-applicant spouse or other person, this Statement and supporting schedules must be completed about that spouse or other person also.

Completed Jointly Not Jointly

ASSETS AND LIABILITIES

Liabilities and Pledged Assets. List the creditor's name, address, and account number for all outstanding debts, including automobile loans, revolving charge accounts, real estate loans, alimony, child support, stock pledges, etc. Use continuation sheet, if necessary. Indicate by (*) those liabilities, which will be satisfied upon sale of real estate owned or upon refinancing of the subject property.

ASSETS	Cash or Market Value	LIABILITIES	Monthly Payment & Months Left to Pay	Unpaid Balance
<i>List checking and savings accounts below</i>				
Name and address of Bank, S&I, or Credit Union		Name and address of Company	\$ Payment/Months	
Acct. no.	\$	Acct. no.		
Name and address of Bank, S&I, or Credit Union		Name and address of Company	\$ Payment/Months	
Acct. no.	\$	Acct. no.		
Name and address of Bank, S&I, or Credit Union		Name and address of Company	\$ Payment/Months	
Acct. no.	\$	Acct. no.		
Name and address of Bank, S&I, or Credit Union		Name and address of Company	\$ Payment/Months	
Acct. no.	\$	Acct. no.		
Stocks & Bonds (Company name/number & description)	\$	Name and address of Company	\$ Payment/Months	
		Acct. no.		
Life insurance net cash value	\$	Name and address of Company	\$ Payment/Months	
Face amount: \$				
Subtotal Liquid Assets	\$			
Real estate owned (enter market value from schedule of real estate owned)	\$			
Vested interest in retirement fund	\$	Acct. no.		
Net worth of business(es) owned (attach financial statement)	\$	Alimony/Child Support/ Separate Maintenance Payments Owed to:	\$	
Automobiles owned (make and year)	\$	Job-Related Expense (child care, union dues, etc.)		
		Total Monthly Payments	\$	
Other Assets (itemize)	\$			
Total Assets a.	\$	Net Worth (a minus b) ▶	\$	Total Liabilities \$

For the purpose of procuring credit from time to time, I/We furnish the foregoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the Lender to verify in any manner it deems appropriate any and all items indicated on this statement. The undersigned also agrees to notify the Lender immediately in writing of any significant adverse change in such financial condition. Each of the undersigned hereby acknowledges that any owner of the Loan, its servicers, successors and assigns, may verify or reverify any information contained in this application or obtain any information or data relating to the Loan, for any legitimate business purpose through any source, including a source named in this application or a consumer reporting agency.

Date Signed _____ 20__ Signature _____ Signature _____
(Other Person if Applicable)