

## PERSONAL FINANCIAL STATEMENT

Name: \_\_\_\_\_

As of: \_\_\_\_\_

Assets	Current Value	Liabilities	Monthly Pay	Balance Owing
Cash on hand and in banks	\$	Primary Residence Mort	\$	\$
Savings Accounts	\$	Investment Property Mort	\$	\$
Stock and Bonds (Section 4)	\$	Credit Card Payable	\$	\$
IRA or other retirement account	\$	Loans against business	\$	\$
Notes Receivable (Section 3)	\$	Notes Payable	\$	\$
Life Insurance (Section 6)	\$	Auto Loan Payable	\$	\$
Value of Business (Section 5)	\$	Tax Payable	\$	\$
Real Estate (Section 2)	\$	Other Debts	\$	\$
Personal Properties (Automobiles)	\$	Total Liabilities		\$
Other Assets	\$	Net Worth (Total Assets - Total Liabilities)		\$
Total Assets	\$	Total Liabilities and Net Worth		\$

Section 1.

Source of Income		Contingent Liabilities	
Salary	\$	As endorser & co-maker	\$
Investment Income	\$	Legal claims & judgments	\$
Real Estate Income	\$	Provision for federal income tax	\$
Interest	\$	Other special debt	\$
* Other Income (Described below)	\$		

**\* Alimony, Child Support or Separate Maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation**

Section 2.

	Property A	Property B	Property C
Type of Property			
Property Address			
Date Purchased			
Original Cost			
Present Market Value			
Mortgage Holder			
Mortgage Balance			
Monthly Payment			
Annual Income			
Annual Expense			

Section 3. Notes Receivable

Name of Debtor	Original Balance	Current Balance	Payment Amount	Frequency	Collateral

Section 4. Stock and Bonds

Name of Securities	Number of Shares	Cost	Market Value	L-Listed / U-Unlisted

Section 5. Value of Business

Type of business	Address	Date Purchased	Purchase Price	Market Value	Loan Balance	Monthly Pay

Section 6. Cash Surrender Value of Life Insurance

Insurance Company	Face Value	Beneficiary	Cash Value	Loans

<b>MARRIED PERSON'S CONTRACTUAL LIABILITY QUESTIONNAIRE (Any "Yes" answer requires spouse to sign below)</b>	
1. If this statement is given for personal credit answer the following questions which will indicate how you and your spouse will be contractually liable.	2. If this statement is given to support business credit or your Guaranty of another person or any proprietorship, partnership, LLC, or corporate credit answer following question. Will your Spouse be Voluntarily liable by signing a Guaranty? <input type="checkbox"/> YES <input type="checkbox"/> NO
a) Will you and your spouse be joint applicants by both signing a note? <input type="checkbox"/> YES <input type="checkbox"/> NO	
b) Will your spouse be voluntarily liable by signing a Guaranty? <input type="checkbox"/> YES <input type="checkbox"/> NO	
NOTE:if this statement is given for personal credit and for business credit or guaranties, answer both Questions 1 and 2.	

General Information

Are you a defendant in any lawsuit or legal action? Yes \_\_\_ No \_\_\_      Have you ever declared or filed for bankruptcy? Yes \_\_\_ No \_\_\_  
 Are you a guarantor or co-signer for others' debts? Yes \_\_\_ No \_\_\_      Have you made a testamentary will? Yes \_\_\_ No \_\_\_  
 Are you a U.S. Citizen? Yes \_\_\_ No \_\_\_      If NO, then what is your residence status? \_\_\_\_\_  
 Please explain any of the questions that are answered "Yes" in a separate paper.

I (We) authorize UnBank to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness.

I (We) certify the above statements contained in the attachments are true and accurate as of the stated date(s) . These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE Statements may result in forfeiture of benefits and possible prosecution by the U.S. Attorney General (Reference 18 U.S. C. 10001).

\_\_\_\_\_  
**Signature of Applicant**  
 Any Signature on note or guaranty obligates future earnings

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature of Applicant/Co-Applicant**  
 Spouse Sign Only if you will be a joint applicant or voluntarily liable under a guaranty.

\_\_\_\_\_  
**Date**