

Personal Financial Statement



PERSONAL FINANCIAL STATEMENT

Please complete this form for

- each proprietor or
- each limited partner who owns 20% or more interest and each general partner, or
- each stockholder owning 20% or more of voting stock, or
- any person or entity providing a guaranty on the loan.

BUSINESS CARDHOLDER INFORMATION

First Name *

Last Name *

Spouse's Name

Residence Address *

City *

State *

Zip Code *

Residence Phone # *

Business Phone #

Business Name of Applicant/Borrower

ASSETS (Omit Cents)

Cash on hand & in
banks/credit unions

Savings Accounts

IRAs or other retirement
accounts

Accounts & Notes Receivable

Life Insurance (Cash

Life insurance (Cash
surrender value only)
Complete Section 8.

Stocks & Bonds \$

Real Estate (*Describe in
Section 4*) \$

Automobiles (*present value*) \$

TOTAL \$

LIABILITIES (Omit Cents)

Accounts Payable \$

Notes payable to banks &
others (*Describe in Section
2*) \$

Installment account (auto) \$

Monthly payments (auto) \$

Installment account (other) \$

Monthly payments (other) \$

Loan on life insurance \$

Mortgages on real estate \$
(Describe in Section 4)

Unpaid taxes (*Describe in
Section 6*) \$

Other liabilities (*Describe in
Section 7*) \$

TOTAL \$

Net Worth \$

CONTINGENT LIABILITIES

As endorser or co-maker \$

Legal claims & judgments \$

Provision for federal income
tax \$

Other special debt \$

SECTION 4: Real Estate Owned

PROPERTY A

Type of Property

Address

City

State

Zip Code

Date Purchased

Original Cost \$

Present Market Value \$

Name of Mortgage Holder

Mortgage Holder Address

Mortgage Holder City

Mortgage Holder State

Mortgage Holder Zip Code

Mortgage Account #

Mortgage Balance \$

Monthly Payment Amount \$

Status of Mortgage

I have another property.

SECTION 5: Other Personal Property & Assets

Please describe your other personal property & assets. If any is pledged as a security, please list the name & address of lien holder, amount of lien, and terms of payment. If delinquent, please describe the delinquency.

SECTION 6: Unpaid Taxes

Please describe (in detail) the type, to whom you owe, when due, the amount, and to what property (if any) a tax lien attached.

SECTION 7: Other Liabilities

Please describe in detail.

SECTION 7: Other Liabilities

Please give the face amount and cash surrender value of policies, name of insurance company, and beneficiaries.

Authorization

I authorize Vantage West Credit Union to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the 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.

Social Security # *

Cardholder Signature (Use your mouse to sign in the space below.) *

clear

Submit

Updated: October 1, 2015