

**FOR SECURITY PURPOSES, DO NOT RETURN THE COMPLETED STATEMENT VIA UNENCRYPTED 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 named 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.

Statement of financial condition as of:  

INDIVIDUAL 1		INDIVIDUAL 2	
Full Name	SSN	Full Name	SSN
Street Address		Street Address	
City, State, Zip		City, State, Zip	
Since	<input type="checkbox"/> Rented <input type="checkbox"/> Owned	Since	<input type="checkbox"/> Rented <input type="checkbox"/> Owned
Previous Address if < 5 years		Previous Address if < 5 years	
City, State, Zip		City, State, Zip	
Since	<input type="checkbox"/> Rented <input type="checkbox"/> Owned	Since	<input type="checkbox"/> Rented <input type="checkbox"/> Owned
Date of Birth	Dependents Excluding Self	Date of Birth	Dependents Excluding Self
Residence Phone	Work Phone	Residence Phone	Work Phone
E-Mail Address	Cell Phone	E-Mail Address	Cell Phone
Employer	Since	Employer	Since
Address		Address	
Position / Title		Position / Title	
Marital Status* :	<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated	Marital Status* :	<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated

\* Do not provide this information if this form is being submitted in conjunction with an application for individual, unsecured credit.

**PLEASE COMPLETE ATTACHED SCHEDULES 1-14**

ASSETS		LIABILITIES	
Cash Schedule ( Schedule 1 )		Loans & Notes Due to Financial Institutions ( Schedule 9 )	
Securities ( Schedule 2 )		Loans & Notes Due to Others ( Schedule 10 )	
Life Insurance Cash Value ( Schedule 3 )		Credit Cards & Other Revolving Accounts ( Schedule 11 )	
Mortgages and Contracts Held by You ( Schedule 4 )		Other Debts - Lease Payments, Unpaid Taxes, Etc. ( Schedule 12 )	
Closely Held Business Investments ( Schedule 5 )		Insurance Loans ( Schedule 3 )	
Primary Residence ( Schedule 6 )		Mortgages on Primary Residence ( Schedule 6 )	
Other Real Estate ( Schedule 7 )		Mortgages on Other Real Estate ( Schedule 7 )	
Profit Sharing, Pension, IRA & Other Retirement ( Schedule 8 )		Profit Sharing, Pension and IRA Loans ( Schedule 8 )	
Vehicles ( Schedule 13 )		Other Liabilities ( Schedule 13 )	
Personal Property			
Other Assets ( Schedule 13 )			
<b>TOTAL Assets \$</b>		<b>TOTAL Liabilities \$</b>	
		<b>Net Worth \$</b>	

ANNUAL INCOME	Applicant	Co-Applicant
Salary		
Commissions		
Dividends		
Interest		
Rentals		
Alimony, Child support or Maintenance - need not be revealed if you do not wish to have it considered as a basis for repaying this obligation		
Other		
<b>TOTAL INCOME</b>		

**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>			

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

No. of Shares	Description	Registered in Name(s) of	Listed / Unlisted	Current Market Value
<b>TOTAL \$</b>				

**Schedule 3 / Life Insurance**

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

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

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

**Schedule 5 / Closely Held Business Investments (attach additional schedule if necessary)**

Company Name	Description of Business / Investment	Ownership (%)	Source of Value	Value
<b>Attached Schedule</b>				
<b>TOTAL \$</b>				

**Schedule 6 / Primary Residence**

Year Acquired	Name of Creditor	Purchase Price	Mortgage Balance	Maturity Date	How Owned JT, IND, Trust	Repayment Terms	Current Market Value
Address							

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

**Schedule 7 / Other Real Estate Owned (attach additional schedule if necessary)**

Property Type Address	Year Acquired	Name of Creditor	Purchase Price	Mortgage Balance	Maturity Date	How Owned JT, IND, Trust	Repayment Terms	Current Market Value
				Attached Schedule				Attached Schedule
				TOTAL \$				TOTAL \$

**Schedule 8 / Profit Sharing, Pension, IRA Accounts & Other Retirement Accounts**

Name of Institution	Type of Account	Account Balance	Vested Balance	Loans
		TOTALS \$		

**Schedule 9 / Loans & Notes Due to Financial Institutions**

Name of Creditor	Collateral	Maturity Date	Repayment Terms	Balance Due
				TOTAL \$

**Schedule 10 / Loans & Notes Due to Others**

Name of Creditor	Collateral	Maturity Date	Repayment Terms	Balance Due
				TOTAL \$

**Schedule 11 / Credit Cards & Other Revolving Accounts**

Name of Creditor	Collateral	Maturity Date	Repayment Terms	Balance Due
				TOTAL \$



Statement of financial condition as of:

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INDIVIDUAL 1		INDIVIDUAL 2	
Full Name	SSN	Full Name	SSN

**Schedule 5 / Closely Held Business Investments (continuation from main schedule)**

Company Name	Description of Business / Investment	Ownership (%)	Source of Value	Value
<b>SUBTOTAL \$</b>				

**Schedule 7 / Other Real Estate Owned (continuation from main schedule)**

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

**Schedule 14 / Contingent Liabilities - Endorser, Grantor, Lawsuits, For Taxes, Other (continuation from main schedule)**

Contingent Liabilities ( Describe )	Amount
<b>SUBTOTAL \$</b>	