

**Prosperity Bank Personal Financial Statement Dated as of \_\_\_\_\_**

SECTION 1 APPLICANT INFORMATION (Type or Print)		SECTION 2 CO-APPLICANT INFORMATION (Type or Print)	
Name		Name	
Date of Birth	Social Security #	Date of Birth	Social Security #
Residence Address		Residence Address	
City, State & Zip		City, State & Zip	
Position or Occupation	Number of Years	Position or Occupation	Number of Years
Employer Name		Employer Name	
Res. Phone	Bus. Phone	Res. Phone	Bus. Phone
Nearest Relative Not Living With Me	Relationship	Nearest Relative Not Living With Me	Relationship
Address	Phone	Address	Phone

Amount Requested: \$ \_\_\_\_\_ Purpose of Loan: \_\_\_\_\_

SECTION 3 STATEMENT OF FINANCIAL CONDITION					
Indicate "A" (Applicant), "C" (Co-Applicant) or "J" (Jointly held with others) beside assets and liabilities to indicate to whom item applies					
ASSETS	A,C or J	\$ Amount	LIABILITIES	A,C or J	\$ Amount
Cash on Hand & in Banks – Schedule A			Notes Payable to Banks–Secured – Schedule E		
IRAs, 401K & Retirement Assets			Notes Payable to Banks–Unsecured – Schedule E		
U.S. Gov't & Marketable Securities – Schedule B			Due to Brokers-Margin Loans – Schedule E		
Securities Held by Broker in Margin Accounts			Amounts Payable to Others-Secured		
Restricted or Control Stocks (Public Co. only)			Credit Cards – Schedule E		
Real Estate Owned – Schedule C			Equity Lines – Schedule E		
Loans Receivable			Unpaid Taxes (Income, Property, etc.)		
Cash Value – Life Insurance – Schedule D			Real Estate Mortgages Payable – Schedule C		
Value of Closely Held Business			Other Debts – Itemize		
Automobiles & Other Personal Property					
Other Assets – Itemize					
			<b>TOTAL LIABILITIES</b>		
			<b>NET WORTH</b>		
<b>TOTAL ASSETS</b>			<b>TOTAL LIABILITIES &amp; NET WORTH</b>		

INCOME FOR YEAR ENDED:	Applicant	Co-Applicant	EXPENSES
Salary	\$	\$	Rent payment \$
Bonuses & Commissions	\$	\$	Alimony \$
Interest & Dividends	\$	\$	Child Support \$
Rental Income	\$	\$	Tuition \$
Other Income (alimony or child support need not be revealed if you do not wish to have it considered as a basis for repaying this obligation)			<b>PERSONAL INFORMATION (both Applicant &amp; Co-Applicant)</b>
			Are you a US Citizen? yes
<b>TOTAL INCOME</b>			Do you have a Will?
<b>CONTINGENT LIABILITIES</b>			If so, name of executor:
Do you have any contingent liabilities? If so, describe.			Are you a partner or officer in any other venture? If so, describe
As endorser, co-maker or guarantor?	\$	\$	Income tax settled through (date)
On leases or contracts?	\$	\$	Are any assets pledged other than as described on schedules? If so, describe.
Legal claims	\$	\$	
Other special debt	\$	\$	Are you a defendant in any suits or legal actions? If so, describe.
Amount of contested income tax liens	\$	\$	Have you or your businesses ever been declared bankrupt?

**SCHEDULE A – CASH AND INVESTMENTS**

Type of Account	Name of Bank or Broker	In Name Of	Are These Pledged?	Current Balance

**SCHEDULE B – U.S. GOVERNMENT & MARKETABLE SECURITIES**

Number of Shares	Description	In Name Of	Are These Pledged?	Date of Value	Value

**SCHEDULE C – REAL ESTATE OWNED**

Address of Property	Property Description – Type: Commercial (C), Residential (R), Agriculture (A); Use: Office, Warehouse, Home, Lot; Size: Square Footage			Cost	Date Acquired	Current Market Value
	Type	Use	Size			
1						
2						
3						
4						
Name of Lender	Title In Name Of	Mortgage Balance	Monthly Payment	Monthly Rental Income	Ownership Percentage	
1						
2						
3						
4						

**SCHEDULE D – LIFE INSURANCE CARRIED, INCLUDING WHOLE LIFE AND GROUP INSURANCE**

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

**SCHEDULE E – BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED**

Name of Lender	Collateral Description	Type (Line of Credit, Term Loan)	Maximum Line Amount	Monthly Payment	Current Balance	Maturity

**NOTICE – JOINT CREDIT**

*We intend to apply for joint credit. (initials)* \_\_\_\_\_

This information and the information provided on all accompanying financial statements and schedules is provided for the purpose of obtaining credit for the Applicant(s) or for the purpose of Applicant(s) guaranteeing credit for others. Applicants(s) acknowledge that representations made in this statement will be relied on by Creditor in its decision to grant such credit. This statement is true and correct in every detail and accurately represents the financial condition of the Applicant(s) on the date given below. Creditor is authorized to make all inquiries it deems necessary to verify the accuracy of the information contained herein and to determine the creditworthiness of the Applicant(s). Applicants(s) will promptly notify Creditor of any subsequent changes which would affect the accuracy of this Statement. Creditor is further authorized to answer any questions about Creditor's credit experience with Applicant(s). Applicant(s) are aware that any knowing or willful false statements regarding the value of the above property for purposes of influencing the actions of Creditor can be a violation of federal law, 18 U.S.C & 1014, and may result in a fine or imprisonment of both.

In addition, each individual signing below authorizes the Creditor to check their individual credit account and employment history and have a credit reporting agency prepare a consumer credit report on them.

By signing below, the undersigned agree(s) to all the terms and conditions beginning on page 1 through the bottom of page 2 of this Application.

Customer Signature (Applicant) \_\_\_\_\_  
 Printed Name (Applicant) \_\_\_\_\_  
 Date Signed \_\_\_\_\_

Signature (Co-Applicant) \_\_\_\_\_  
 Printed Name (Co-Applicant) \_\_\_\_\_  
 Date Signed \_\_\_\_\_

**SUMMARIZED DEBT SCHEDULE**

Name of Borrower: \_\_\_\_\_

Date: \_\_\_\_\_

Annual Prin. & Int.  
Payments

**Existing Debt:**

1) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

2) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

3) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

4) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

5) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

6) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

7) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

**Proposed Debt:**

1) \$ \_\_\_\_\_ note payable to \_\_\_\_\_, secured by \_\_\_\_\_  
\_\_\_\_\_ with a present interest rate of \_\_\_\_\_% maturing on \_\_\_\_\_.  
Payments consist of \_\_\_\_\_.

\$ \_\_\_\_\_

**TOTAL ANNUAL DEBT SERVICE**

\$ \_\_\_\_\_