

# PERSONAL FINANCIAL STATEMENT

Please complete all information, sign and date form.

## APPLICANT:

Applicant's Name _____			Social Security # _____	Date of Birth _____
Street Address _____			How Long? <input type="radio"/> Own <input type="radio"/> Rent	Email Address _____
City _____	State _____	Zip Code _____	Monthly Payment _____	Home Telephone _____
Current Employer _____			Position _____	Business Telephone _____
Address _____			How Long? _____	Annual Salary (verifiable) _____

## JOINT APPLICANT:

Applicant's Name _____			Social Security # _____	Date of Birth _____
Street Address _____			How Long? <input type="radio"/> Own <input type="radio"/> Rent	Email Address _____
City _____	State _____	Zip Code _____	Monthly Payment _____	Home Telephone _____
Current Employer _____			Position _____	Business Telephone _____
Address _____			How Long? _____	Annual Salary (verifiable) _____

Personal Assets and Liabilities are Stated as of Date: \_\_\_\_\_

### ASSETS:

Cash on Hand and in Bank	(A) _____
Marketable Securities	(B) _____
Accounts and Notes Receivable	(C) _____
Real Estate Owned – Residence	(D) _____
Real Estate Owned – Others	(D) _____
Partial Interest in Real Estate	(E) _____
Closely-Held Businesses	_____
Automobiles	_____
Cash Value – Life Insurance	(F) _____
Individual Retirement Account – IRA, 401K	_____
Personal Property	_____
Other Assets	_____

### TOTAL ASSETS:

### ANNUAL INCOME: (verifiable)

Applicant's Salary	_____
Commissions/Bonuses	_____
Joint Applicant's Salary	_____
Commissions/Bonuses	_____
Dividend and Interest	_____
Business Income	_____
Gross Rental Income	_____
Other Income*	_____
<b>TOTAL INCOME:</b>	_____

### LIABILITIES:

Notes Payable Bank	_____
Notes Payable Others	_____
Real Estate Mortgages – Residence	_____
Real Estate Mortgages – Others	_____
Home Equity Loans	_____
Auto Loans	_____
Credit Card Accounts (aggregate balance)	_____
Other Debits	_____

### TOTAL LIABILITIES:

**NET WORTH:**  
(= Total Assets - Total Liabilities) \_\_\_\_\_

**TOTAL LIABILITIES AND NET WORTH:** \_\_\_\_\_

### ANNUAL EXPENSES:

Income Taxes (State and Federal)	_____
Rent or Mortgage Payment	_____
Auto Loan Payments	_____
Credit Card Payments	_____
Other Loan Payments	_____
Medical and Dental Expenses	_____
Living Expenses	_____
All Other Expenses (Alimony, tuition, child support)	_____

**TOTAL EXPENSES:** \_\_\_\_\_

\*Alimony, child support or maintenance payments need not be indicated if the applicant does not choose to disclose such income.

Please Complete Schedules On Other Side



**(A) BANKING INFORMATION:**

Bank/Credit Union	Address	Account Type	Account #	Current Balance	Maturity
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**(B) MARKETABLE SECURITIES/MUTUAL FUNDS:**

Description	Legal Owner	# of Shares	Cost	Market Value	Pledged?
_____	_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
_____	_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
_____	_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
_____	_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No

**(C) ACCOUNTS AND NOTES RECEIVABLE:**

Borrower	Address	Original Amount	Current Balance	When Due	Collateral
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**(D) REAL ESTATE OWNED-RESIDENCE AND OTHERS:**

Description and Location	Legal Owner	Cost	Market Value	Mortgage Balance	Monthly Payment
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**(E) PARTIAL INTEREST IN REAL ESTATE (State Percentage Of Ownership):**

Description and Location	Legal Owner	% Interest	Cost	Market Value	Mortgage Balance	Monthly Payment
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

**(F) CASH VALUE:**

Insurance Company's Name	Beneficiary	Face Value	Loans	Cash Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

The undersigned certifies that both sides hereof and the information inserted therein has been carefully read and is true and complete. The undersigned further represents that there are no encumbrances against any of the foregoing property except those specifically disclosed above. People's United Bank is authorized to verify the information disclosed and to perform a credit investigation. The undersigned authorizes People's United Bank to give credit information to any credit reporting service and to advise others about its credit experience with the applicant. It is also agreed that the financial statement shall remain the property of People's United Bank, whether or not credit is granted.

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Joint Applicant's Signature

\_\_\_\_\_  
Date Signed

