

# Personal Financial Statement

Bank Of Advance \_\_\_\_\_

Amount of Loan Requested: \_\_\_\_\_

Payment Date Requested: \_\_\_\_\_

Purpose: \_\_\_\_\_

**Please tell us about yourself and co-applicant, if applicable**

Applicant's Name				Co-Applicant's Name			
Home Address Number and Street			Yrs/Mos	Home Address Number and Street			Yrs/Mos
City, State, Zip Code		County		City, State, Zip Code		County	
Social Security Number	Home Phone No.	Date of Birth		Social Security Number	Home Phone No.	Date of Birth	
Driver's License No.	No. Dependents	Ages of Dependents		Driver's License No.	No. Dependents	Ages of Dependents	
Applicant's Previous Home Address						Yrs/Mos	

**About Your Job(s)**

Business Name or Employer <input type="checkbox"/> Self Employed (Additional information required)				Co-Applicant's Employer <input type="checkbox"/> Self Employed (Additional information required)			
Business Address Number and Street			Yrs/Mos	Business Address Number and Street			Yrs/Mos
City, State, Zip Code		Business Phone		City, State, Zip Code		Business Phone	
Position		Personal Monthly Employment Income \$		Position		Co-Applicant's Monthly Employment Income \$	
Previous Employer			Yrs/Mos	Co-Applicant's Previous Employer			Yrs/Mos

**About Your Other Income**

*You need not disclose alimony, child support or separate maintenance income unless you want us to consider it for purposes of this application.*

Annual Interest & Dividend Income \$	Monthly child support or separate maintenance \$	Other Monthly Household Income \$	Please describe the sources of Other Household Income.
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**Marital Status**

*Do not complete if this is an Application for individual unsecured credit*

Applicant <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Unmarried (including single, divorced, and widowed)
Co-Applicant <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Unmarried (including single, divorced, and widowed)

**About Your Existing Loans And Accounts**

Rent Home  
 Own Home in the following name(s):

Monthly Rent or Payment \$	Purchase Price \$	Original Loan Amount \$	Balance Owing \$	Present Value \$	Date Purchased
Name and address of Mortgage Holder or Landlord					
Name of My Bank			Checking Account No.	Savings Account No.	
Have you ever had a judgment filed against you or declared bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No		Date: _____ (Attach details.)	Monthly child support or separate maintenance payment \$		
Name of nearest relative not living with you		Address	Phone No.	Relationship	

ASSETS		OBLIGATIONS		
Description	Amount	Description	Amount Owed	Mo. Payments
1. Cash, Complete Schedule 1 (On back)	\$	10. Bank Loans-Unsecured	\$	\$
2. Stocks or Bonds Complete Schedule 2 (On Back)		11. Bank Loans-Secured		
3. Real Estate Complete Schedule 3 (On Back)		12. Real Estate Loans Complete Schedule 3 (On Back)		
4. Automobiles Complete Schedule 4 (On Back)		13. Auto Loans or Lease Payments Complete Schedule 4 (On Back)		
5. Cash Value of Life Insurance (Face Value) \$ _____ Complete Schedule 5 (On Back)		14. Life Ins. Loans Complete Schedule 5 (On Back)		
6. Notes Receivable		15. Credit Cards Complete Schedule 7 (On Back)		
7. IRA, Keogh or Retirement Funds Complete Schedule 6 (On Back)		16. Other Obligations Complete Schedule 9 (On Back)		
8. Other Assets Complete Schedule 8 (On Back)				
9. Networth of Business (Attach Financial Statement)				
<b>TOTAL ASSETS</b> \$		<b>TOTAL OBLIGATIONS</b> \$		\$
		<b>NET WORTH</b> \$		

Please attach any additional information that will be helpful in approving your application.

I/We represent that this application is complete and accurate and fully reflects my/our financial condition on the date shown below. I/We authorize Lender to obtain a credit report and any other information it deems necessary about my/our credit worthiness. I/We agree to notify Lender immediately, in writing, of any adverse change in my/our financial condition. I/We understand that Lender will retain this Application whether or not it is approved.  Lender may share information about you with other organizations that are its affiliates unless you direct Lender not to do so. If you do not want Lender to share such information with its affiliates, please initial here. \_\_\_\_\_

X Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_ X Co-Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

**PLEASE COMPLETE INFORMATION ON REVERSE SIDE**

## ASSET AND LIABILITIES SCHEDULE

### SCHEDULE 1 - CASH DEPOSITS

FINANCIAL INSTITUTION	ACCOUNT NUMBER	AMOUNT
		\$
<b>TOTAL</b>		<b>\$</b>

### SCHEDULE 2 - STOCKS AND BONDS OWNED

NO. OF SHARES	COMPANY	REGISTERED IN NAME(S) OF	MKT VALUE PER SHARE	MARKET VALUE
			\$	\$
<b>TOTAL</b>				<b>\$</b>

### SCHEDULE 3 - REAL ESTATE OWNED

DESCRIPTION OF PROPERTY	ORIGINAL LOAN AMOUNT	EQUITY	MARKET VALUE	MONTHLY PAYMENT	PRESENT BALANCE
	\$	\$	\$	\$	\$
<b>TOTAL</b>		<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

### SCHEDULE 4 - AUTOMOBILES AND OTHER TITLED VEHICLES

YEAR	MAKE	MODEL	VALUE	MONTHLY PAYMENT	PRESENT BALANCE
			\$		\$
<b>TOTAL</b>			<b>\$</b>	<b>\$</b>	<b>\$</b>

### SCHEDULE 5 - LIFE INSURANCE

COMPANY	BENEFICIARY	CASH VALUE OF LIFE INSURANCE	POLICY LOANS
		\$	\$
<b>TOTAL</b>		<b>\$</b>	<b>\$</b>

### SCHEDULE 6 - IRA, KEOGH OR RETIREMENT FUNDS

FINANCIAL INSTITUTION	VESTED INTEREST	
	\$	
<b>TOTAL</b>		<b>\$</b>

### SCHEDULE 7 - CREDIT CARDS

COMPANY	ACCOUNT NUMBER	MONTHLY PAYMENT	PRESENT BALANCE
		\$	\$
<b>TOTAL</b>		<b>\$</b>	<b>\$</b>

### SCHEDULE 8 - OTHER ASSETS

DESCRIPTION	VALUE	
	\$	
<b>TOTAL</b>		<b>\$</b>

### SCHEDULE 9 - OTHER OBLIGATIONS

DESCRIPTION	SECURITY	MONTHLY PAYMENT	PRESENT BALANCE
		\$	\$
<b>TOTAL</b>		<b>\$</b>	<b>\$</b>