

Personal Financial Statement and Credit Application

PERSONAL PROFILE

You may apply for credit alone, regardless of marital status. Check your marital status below only if (a) you live in a community property state such as Arizona, California, Nevada, New Mexico or Texas, or (b) this is a joint application with your spouse.

If you are married and live in a community property state, _____ will assume that all assets, debts and income listed below are community property subject to your sole management and control or to the joint management and control of you and your spouse, unless you otherwise indicate.

Check one of the following: Married Unmarried Separated

NAME		DATE OF BIRTH	SOCIAL SECURITY NO.
STREET ADDRESS		CITY	STATE ZIP
HOW LONG AT ADDRESS ___ Yrs ___ Mos <input type="checkbox"/> OWN <input type="checkbox"/> RENT <input type="checkbox"/> OTHER		HOME PHONE ()	
EMPLOYED BY	HOW LONG ___ Yrs ___ Mos	OCCUPATION	BUSINESS PHONE ()
EMPLOYER ADDRESS		CITY	STATE ZIP
SPOUSE'S NAME		DATE OF BIRTH	SOCIAL SECURITY NO
EMPLOYED BY	HOW LONG ___ Yrs ___ Mos	OCCUPATION	BUSINESS PHONE ()
EMPLOYER ADDRESS		CITY	STATE ZIP
TOTAL NUMBER OF DEPENDENTS		AGES OF DEPENDENTS	

Financial Information as of _____ / _____ / _____
MONTH DAY YEAR

ASSETS (List and describe all assets)	Market Value
CHECKING Name of Financial Institution	\$
	\$
SAVINGS Name of Financial Institution	\$
	\$
ACCOUNTS/NOTES RECEIVABLE (Please itemize)	
Marketable Securities (from Schedule A on reverse)	
Businesses Owned (from Schedule B on reverse)	
Real Estate (from Schedule C on reverse)	
Retirement Accounts (Vested interest)	
OTHER ASSETS (Please itemize)	
TOTAL ASSETS	\$

LIABILITIES (List creditor name)	BALANCE OWING	MONTHLY PAYMENT
List credit cards, open lines of credit and other liabilities (including alimony and child support) Also list loans with assets used as security		
CREDIT CARDS/LINES OF CREDIT (Please itemize)	\$	\$
Real Estate Loans (Schedule C on reverse)		
Monthly Rent Payment		
OTHER OBLIGATIONS (Please itemize)		
NET WORTH TOTAL MINUS TOTAL	\$	
	ASSETS	LIABILITIES
TOTAL TOTAL PLUS NET	\$	
	LIABILITIES	WORTH

ANNUAL INCOME	
Income Sources: Income from alimony, child support or separate maintenance does not have to be stated unless you want it to be considered	
Your Gross Annual Salary	\$
Your Spouse's Gross Annual Salary	\$
Gross Annual Rental Income	\$
OTHER INCOME (Please itemize)	
	\$
	\$
Is any of this income likely to be reduced or interrupted within the next year? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how long will the interruption last? Describe	

ANNUAL EXPENDITURES	
Real Estate Payment(s)	\$
Rental/Lease Payment(s)	\$
Income Taxes	\$
Insurance Premiums (all types)	\$
Property Taxes	\$
Alimony, Child Support or Separate Maintenance	\$
Other (include installment payments other than real estate)	\$
1.	\$
2.	\$
TOTAL EXPENDITURES	\$
Do you have loans/obligations in any other individual or business name? <input type="checkbox"/> Yes, describe <input type="checkbox"/> No	
1.	
2.	
TOTAL	\$

SCHEDULE A – Marketable Securities (Attach Supplemental Schedule if necessary)

NO. OF SHARES AMT. OF BONDS	DESCRIPTION	EXCHANGE LISTED	NAMES(S) OF OWNERS)	*OWNERSHIP TYPE	CURRENT MARKET ON LISTED OR ESTIMATED VALUE ON UNLISTED	PURCHASED ON MARGIN OR PLEDGED

*OWNERSHIP TYPE: TE = Tenants by Entirety CP = Community Property JT = Joint Tenancy TC = Tenants in Common SP = Separate Property

SCHEDULE B – Business(es) Owned (Attach Supplemental Schedule if necessary)

NO. OF SHARES	DESCRIPTION	NAMES(S) OF OWNER(S)	*OWNERSHIP TYPE	PERCENTAGE OWNERSHIP	CURRENT VALUE

SCHEDULE C – Real Estate (Attach Supplemental Schedule if necessary)

PROPERTY ADDRESS AND TYPE OF IMPROVEMENT	PURCHASE DATE	NAME(S) OF OWNER(S)	OWNERSHIP TYPE	NET ANNUAL RENTAL INCOME	ESTIMATED VALUE	AMOUNT OWING	TO WHOM/ MONTHLY PAYMENT

GENERAL INFORMATION ON APPLICANT AND SPOUSE Provide full details on any “yes” answers to questions 2-6 (attach separate sheet if necessary)

- Are your principal cash deposits held jointly with another person? Yes No If yes, with whom? _____
- Are any assets encumbered or debts secured except as indicated? Yes No
- Are there any suits or unpaid judgments now pending against you? Yes No
- Have you ever voluntarily surrendered or had a vehicle, or any other item repossessed? Yes No
- Have you or your spouse ever been the subject of bankruptcy proceedings? Yes No
- Have you ever applied for or obtained credit under another name? Yes No
- Are you a U.S. citizen? Yes No If no, please give country of citizenship and visa status _____
- Are any assets held in a trust? Yes No

Life Insurance \$ _____ Name of insured _____ Name of company _____

Beneficiary’s name _____ Address _____ Relationship _____

Life Insurance \$ _____ Name of insured _____ Name of company _____

Beneficiary’s name _____ Address _____ Relationship _____

YOUR SIGNATURE

By signing below, you certify that the statements above and on any attachment(s) are true and complete as of the date given below. You authorize _____ to verify or check any of the information given, check your credit references, verify employment and obtain credit reports (including your spouse, if you are married and living in a community property state). You also authorize _____ to provide credit information about you and your accounts to others.

DATE X
APPLICANT

DATE X
APPLICANT