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Application taken by:

Face to Face Interview Mail Telephone Internet

Personal Financial Statement

Important: Read directions before completing Financial Statement.

Personal Financial Statement as of: _____

Applicant's Name _____

Co-Applicant's Name _____

Home Address _____

Phone Number: _____

PLEASE CHECK APPROPRIATE BOX

Individual credit — If relying on your own income and assets and not income and assets of a spouse or another person as a basis for extension or repayment of credit, complete the Financial Statement below for only as it applies to you, individually. Do not provide any information about a spouse or other person.

Joint Credit*

Individual relying upon income or assets of spouse or another person*

*If applying for joint credit or for individual credit relying on income or assets of a spouse or another person for extension and repayment of credit requested, complete the Financial Statement below. Include information about income, assets, and liabilities of the spouse or other person. Both Applicant and Spouse or Co-Applicant sign this statement.

Please do not leave any questions unanswered, use "NO" or "NONE" when necessary.

Table with 2 columns: ASSETS and IN EVEN DOLLARS. Rows include Cash on Hand, U.S. Government Securities, Listed Securities, Unlisted Securities, Other Equity Interests, Accounts & Notes Receivable, Real Estate Owned, Mortgages & Contracts Receivable, Cash Value Life Insurance, Retirement Accounts/IRAs, Other Assets: Itemize, and TOTAL ASSETS.

Table with 2 columns: LIABILITIES & NET WORTH and IN EVEN DOLLARS. Rows include Notes Payable This Credit Union, Notes Payable Other Institutions, Notes Payable — Others, Accounts & Bills Due, Unpaid Taxes, Real Estate Mortgage Payable, Land Contracts Payable, Life Insurance Loans, Other Liabilities: Itemize, TOTAL LIABILITIES, NET WORTH, and TOTAL LIABILITIES & NET WORTH.

Table with 2 columns: SOURCES OF INCOME (or Submit Copy of Most Recent Tax Return) and IN EVEN DOLLARS. Rows include Salary, Bonus & Commissions, Dividends, Real Estate Income, Other Income*: Itemize, and TOTAL. Includes a footnote about Alimony, Child Support, or Separate Maintenance payments.

General Information

Employer _____

Position or Profession _____ Number of Years Employed _____

Employer's Address _____

Partner, officer, or owner in any other venture? Yes No

If so, please explain: _____

Have you ever taken bankruptcy? Yes No

If so, please explain: _____

Are you a Defendant in any suits or legal action? Yes No

If so, please explain: _____

Income Taxes Settled Through (Date) _____

Do you have a Will? Yes No _____ With Whom _____

Do you have a Trust? Yes No _____ With Whom _____

Number of Dependents _____ Ages _____

Table with 2 columns: CONTINGENT LIABILITIES and IN EVEN DOLLARS. Rows include As Endorser, Co-Maker, or Guarantor, On Leases, Legal Claims, Provision for Federal Income Taxes, Other Special Debt (e.g. Recourse or Repurchase), and TOTAL.

Complete Schedules on Second Page — Use Additional Sheet(s) if Necessary

SCHEDULE A: Banks, Brokers, Savings & Loan Association, Finance Companies, or Credit Unions.

List the names of all the institutions at which you maintain a deposit account and/or where you have obtained loans.

NAME OF INSTITUTION	NAME OF ACCOUNT	BALANCE ON DEPOSIT	HIGH CREDIT	AMOUNT OWING	MONTHLY PAYMENT	SECURED BY WHAT ASSETS
TOTAL		\$	TOTAL	\$	\$	

SCHEDULE B: U.S. Government's Stocks (Listed & Unlisted), Bonds (Gov't & Comm.) and Partnership Interests (General & Ltd.)

# OF SHARES, FACE VALUE (BONDS), OR % OF OWNERSHIP	INDICATE: 1. Agency or Name of Company issuing Security and/or Name of Partnership 2. Type of investment or Equity classification 3. Basis of Valuation*	IN NAME OF	MARKET VALUE*	PLEGGED	
				YES <input checked="" type="checkbox"/>	NO <input checked="" type="checkbox"/>
*If Unlisted Security of Partnership interest, provide current financial statements to support bases for valuation.			TOTAL	\$	

SCHEDULE C: Real Estate Owned (and Related Debt, if applicable)

DESCRIPTION OF PROPERTY OR ADDRESS	TITLE IN NAME OF	DATE ACQUIRED	COST & IMPROVEMENTS	PRESENT VALUE	MORTGAGE OR LAND CONTRACT PAYABLE		
					Balance Owing	Mo. Payment	Holder
TOTAL				\$	\$	\$	\$

SCHEDULE D: Mortgages & Land Contracts Receivable (and Related Debt, if applicable)

DESCRIPTION OF PROPERTY OR ADDRESS	TITLE IN NAME OF	DATE ACQUIRED	BALANCE RECEIVABLE	MONTHLY PAYMENT	MORTGAGE OR LAND CONTRACT PAYABLE		
					Balance Owing	Mo. Payment	Holder
TOTAL				\$	\$	\$	\$

SCHEDULE E: Life Insurance Carried

NAME OF COMPANY	FACE AMOUNT	CASH SURRENDER VALUE	LOANS	BENEFICIARY
TOTAL		\$	\$	

I/we have carefully read and submitted the foregoing information provided on both sides of this statement to the Credit Union named on the reverse side. The information is presented as a true and accurate statement of my/our financial condition on the date indicated. This statement is provided for the purpose of obtaining and maintaining credit with said Credit Union. I/we agree that if any material change(s) occur in my/our financial condition that I/we will immediately notify said Credit Union of said change(s) and unless said Credit Union is so notified it may continue to rely upon this financial statement and the representations made herein as a true and accurate statement of my/our financial condition.

I/we authorize the Credit Union to make whatever credit inquiries it deems in connection with this financial statement. I/we authorize and instruct any person or consumer reporting agency to furnish to the Credit Union any information that it may have or obtain in response to such credit inquiries.

I/we also hereby certify that no payment requirements listed herein are delinquent or in default except as follows; if "NONE" so state.

I/we fully understand that it is a federal crime punishable by fine or imprisonment or both to knowingly make any false statements concerning any of the above facts, pursuant to 18 U.S.C. Section 1014.

Applicant's Signature	Date Signed	SSN	Date of Birth
Co-Applicant's Signature	Date Signed	SSN	Date of Birth