



Confidential

Personal Financial Statement as of:
 Primary Member Number:

Important: If you are applying for joint credit with another person or using joint assets, you must complete all sections including Section 2. Both parties are required to sign.

Section 1 - Individual Information				Section 2 - Other Party Information (Joint Applicant)			
Name:				Name:			
Address:				Address:			
City State & Zip:				City State & Zip:			
Phone:		Cell:		Phone:		Cell:	
Occupation:				Occupation:			
Business Name:				Business Name:			
Bus. Address:				Bus. Address:			
City State & Zip:				City State & Zip:			
Bus. Phone:				Bus. Phone:			
Email:				Email:			

Section 3 - Statement of Personal Financial Condition (see schedules)							
Cash on Hand				Credit Cards:			
Other deposits:							
Notes and Accounts due to you (collectable)*:							
Business inventory*:							
Stocks and bonds (detail in schedule B):							
Retirement:							
(401K)							
(IRA)				Business revolving debt:			
Other				Bank	Rate	Limit	
Machinery & Equipment*:							
(personal)							
(business)							
Automobiles:							
Year	Make	Model					
				Debts owed to banks (detail in schedule C):			
				Personal			
				Business			
				Debt and accounts owed to others (detail in schedule D):			
				Personal			
				Business			
				Real estate mortgages (detail in schedule A):			
Cash value of life insurance (details on schedule F):				Lease payments due (list):			
Other personal assets (list)*:							
				Other:			
Real Estate owned (see schedule A):							
Total Assets:			\$ -	Total Liabilities:			\$ -
*if over \$1,000 itemize in Schedule E				Total Net Worth:			\$ -

Personal Information

Do you have a will? Executor:

Are you obligated to pay alimony and/or child support? If so, describe.

Are any assets pledged other than as described on schedules A-F ? If so, describe.

Income tax settled through (date)

Property tax settled through (date)

Are you a defendant in any legal suits or actions?

Have you ever declared bankruptcy? If so, describe.

Have you ever been convicted of a felony? If so, describe.

Business Ownership

Businesses owned	Value	Title	Percent Ownership

Schedule A - Real Estate Owned

Address & Type of Property	Title in Name of:	Cost	Present Value	Balance Owed	Mortgage Held By	Is Escrow included?
		Year Acquired			Monthly Payment	
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Schedule B - Stocks and Bonds

Number of shares or face value (bonds):	Description:	Title in name of:	Are these pledged?	Market value:

Schedule C - Debts Owed to Banks

Personal or Business:	Name of bank:	Collateral pledged:	Monthly payment:	Interest rate:	Current balance:

Schedule D - Debts and Accounts Owed to Others

Personal or Business:	Creditor:	Collateral pledged:	Monthly payment:	Interest rate:	Current balance:

Contingent Liabilities

Do you have any contingent liabilities? If so, describe.			
As endorser, co-maker or guarantor		On leases or contracts	
Legal claims		Other	

Schedule E - Miscellaneous Information

Schedule F - Life Insurance

Insurance company:	Insured:	Beneficiary:	Face value:	Net cash value:

The information contained in this statement is provided for the purpose of obtaining or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations on whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned.

Coming Credit Union is authorized to make all inquiries they deem necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. Coming Credit Union is authorized to answer questions about their credit experience with me/us.

Signature (Principal) _____

S.S. # _____ Date of Birth _____

Signature (Other Party) _____

Date Signed _____

S.S. # _____ Date of Birth _____