

# FINANCIAL SECURITY BANK®

Your dreams. Your bank.®

## Personal Financial Statement

Please contact us if you have any questions regarding the completion of this form.

Check appropriate box concerning credit request:

You are applying for individual credit in your own name and are relying on your own income or assets and not the income or assets of another person as a basis of repayment of the credit requested.

This is an application for joint credit with another person.

We intend to apply for joint credit. Please initial here: \_\_\_\_\_  
Applicant      Co-Applicant

You are applying for individual credit, but are relying on the income or assets of another person as the basis for repayment of the credit request.

### APPLICANT

Business Name \_\_\_\_\_

Full Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

County \_\_\_\_\_ Driver's License # \_\_\_\_\_ Expiration \_\_\_\_\_

Own       Rent      Since \_\_\_\_\_

Email \_\_\_\_\_

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Phone # \_\_\_\_\_ Work # \_\_\_\_\_ Cell # \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

Position/Title \_\_\_\_\_ Since \_\_\_\_\_

Marital Status:  Unmarried       Married       Separated



Round all amounts to the nearest \$100. Please contact your banker if you need assistance completing the schedules.

**Schedule 1 Cash, Savings, Certificates of Deposit, and Money Market Accounts**

Name of Bank or Financial Institution	Type of Account	Acct. Balance
(use attachments if necessary)		<b>Total \$</b>

**Schedule 2 Stocks, Bonds, or Other Securities Owned**

# of shares or bonds	Type of account	Name on account			Current market value
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
			<input type="checkbox"/> Listed	<input type="checkbox"/> Unlisted	
(use attachments if necessary)					<b>Total \$</b>

**Schedule 3 Retirement, 401K, Profit Sharing, Pension, IRA Accounts, Keogh**

Name of Institution	Account Type	Amount Vested %	Account Balance	Loans
(use attachments if necessary)			<b>Totals \$</b>	

**Schedule 4 Cash Value of Life Insurance (whole life only)**

Insurance Company	Name Insured	Beneficiary	Face Value	Cash Value	Loans
<b>Totals \$</b>					

**Schedule 5 Real Estate / Mortgages / Contract for deeds / Contracts Owned**

Personal residence (homestead) Property Address	Lender/Creditor	Purchase		Market Value	Mortgage Balance	Monthly Payment	Monthly Rental Income	Maturity Date
		Year	Price					

Other Real Estate (rental homes, cabin, vacation homes, etc.) Property Address	Lender/Creditor	Purchase		Market Value	Mortgage Balance	Monthly Payment	Monthly Rental Income	Maturity Date
		Year	Price					
<b>Totals \$</b>								

(use attachments if more space is needed)

Commercial Real Estate, Investment Real Estate, Etc. Property Address	Lender/Creditor	Purchase		Market Value	Mortgage Balance	Monthly Payment	Monthly Rental Income	Maturity Date
		Year	Price					
<b>Totals \$</b>								

(Indicate if property is sold on contract for deed by marking "C4D" next to the property address)

