



<b>Legal Name of Undersigned</b>		<b>Social Security Number</b>	
<b>Date of Birth</b>	<b>Phone Number</b>	<b>Email Address</b>	
<b>Primary Residence Street Address (no P.O. Boxes)</b>			
<b>City</b>	<b>State</b>	<b>Zip</b>	<b>How Long?</b>
<b>Employer</b>	<b>Occupation/Position</b>	<b>How Long?</b>	

<b>Legal Name of Spouse</b>		<b>Social Security Number</b>	
<b>Date of Birth</b>	<b>Phone Number</b>	<b>Email Address</b>	
<b>Primary Residence Street Address (no P.O. Boxes)</b>			
<b>City</b>	<b>State</b>	<b>Zip</b>	<b>How Long?</b>
<b>Employer</b>	<b>Occupation/Position</b>	<b>How Long?</b>	

**BALANCE SHEET**  
Please fill in all blanks, writing "0" where necessary, to complete information.

<b>ASSETS</b> <small>(Do not include assets of doubtful value)</small>	<b>Value</b>
1. Cash On Hand in Banks	
2. Marketable Stocks, Securities & Bonds	
3. Retirement Accounts	
4. Other Investments / Business Equity	
5. Cash Value Life Insurance	
6. Primary Residence	
7. Other Real Estate Assets	
8. Automobiles	
9. Personal Property	
10. Other Assets (list):	
11. Other Assets (list):	
12. Other Assets (list):	
<b>13. TOTAL ASSETS</b>	

<b>LIABILITIES</b> <small>(Include All Direct Liabilities)</small>	<b>Balance Owed</b>
14. Debt on Primary Residence	
15. Debt on Other Real Estate	
16. Debt on Automobiles	
17. Student Loans	
18. Credit Cards & Other Revolving Accounts	
19. Unpaid Taxes (list):	
20. Other Debts (list):	
21. Other Debts (list):	
22. Other Debts (list):	
23. Other Debts (list):	
24. Other Debts (list):	
<b>25. TOTAL LIABILITIES</b>	
<b>26. NET WORTH</b>	

**ANNUAL SOURCE OF INCOME**

	<b>Borrower</b>	<b>Spouse</b>
Salary		
Bonus & Commission		
Dividends & Interest		
Real Estate Income (after payments & expenses)		
Other Income (list):		
Other Income (list):		
Other Income (list):		
Other Income (list):		
Other Income (list):		
<small>Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.</small>	<b>TOTAL INCOME</b>	

**CONTINGENT LIABILITIES & GENERAL INFORMATION**

<b>Applies to Your or Spouse</b>	<b>Yes</b>	<b>No</b>	<b>Explanation or Dollar Amount</b>
Guaranteed / Cosigned Debt?			
Defendant in any suit or legal action?			
Judgements / Garnishments / Attachments?			
Ever Filed for Bankruptcy?			
Executed a separate property agreement?			
Do you have a will? (list beneficiary)			
<b>Additional Notes or Explanations for the Above</b>			

In order to induce the above named bank to grant or extend loans for which I am directly or contingently liable, I hereby represent and warrant the above information to be true and complete. I hereby authorize the bank to obtain information concerning any statement made herein. This authorization is continued until such time any and all obligations have been satisfied in full. The Bank is further authorized to investigate my personal credit history under the bank's discretion, including by not limited to pulling credit reports from Equifax, Transunion, and Experian, as well as personally contacting credit references. This statement remains the bank's property whether the loan is or is not granted. You are authorized to furnish information to others regarding your credit experience with me/us.

Signature	Date Signed
Signature	Date Signed

SCHEDULE A CASH ON HAND IN BANKS				
Name of Financial Institution	Type of Account	Owner(s)	Balance	If Pledged / Assigned, Please Explain

SCHEDULE B MARKETABLE STOCKS, SECURITIES, & BONDS				
Description	In the Name Of	Separate Property	Total Value	If Pledged / Assigned, Please Explain

SCHEDULE C RETIREMENT ACCOUNTS				
Description	In the Name Of	Separate Property	Total Value	If Pledged / Assigned, Please Explain

SCHEDULE D UNLISTED STOCKS / BUSINESS EQUITY				
Description	In the Name Of	Separate Property	Total Value	If Pledged / Assigned, Please Explain

SCHEDULE E LIFE INSURANCE CARRIED							
Name of Life Ins Company	Policy Type	Face Amount	Cash Value	Amount of Loan	Policy Owner	Beneficiary	Pledged or Assigned to

SCHEDULE F REAL ESTATE OWNED								
Property Location / Description	Year Acquired	Market Value	Mortgage Amount	Mortgage Payment	Lender	Rental Income	% Owned	

SCHEDULE G DETAILS ON LIABILITIES (LOANS, DEBTS, ETC)			
Name of Creditor	Balance Owed	Monthly Payment	Description

**ADDITIONAL NOTES, EXPLANATION, DISCLOSURES**