

Statement Date _____

Personal Financial Statement

Name:		Primary Phone:	
Residence Address:		Secondary Phone:	
City, State, & Zip Code:		Email:	
Date of Birth:		Occupation:	
Social Security Number:		Employer Name:	
Drivers License Number:		Number of Years:	
Mother's Maiden Name:		Annual Compensation:	
Do You have a Will? <input type="checkbox"/> Yes <input type="checkbox"/> No		If yes, what is the name of the Executor:	
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Unmarried (includes single, divorced and widowed)			
Are you party to any claims or lawsuits or have you ever filed bankruptcy or had a judgment against you? <input type="checkbox"/> Yes <input type="checkbox"/> No			

**(Please attach explanatory notes or detailed schedules as needed)*

Assets		Liabilities	
Cash & Deposit Accounts		Mortgages - Primary Residence	
401K & IRAs		Mortgages - Other Real Estate	
Publicly traded Stocks, Bonds, Investments		Installment loans	
Privately held Business Interests		Credit Cards	
Accounts & Notes Receivable		Unpaid Taxes Due	
Primary Residence		Other Liabilities	
Other Real Estate		Total Liabilities	
Other Assets			
Total Assets		(Assets - Liabilities) Net Worth	

Contingent Liabilities	(explanation)
Guarantor on loans	
Endorser on contracts	
Other Contingent Liabilities	
Total Contingent Liabilities	

Statement of Cash Flow <input type="checkbox"/> Check here if you are providing a current, complete tax return with schedules in lieu of completing this section.			
Salary or Wages		Debt payments	
Rental Property (Gross Income)		Taxes	
Business (Net Income)		Insurance	
Other Income*		Non-Debt Living Expenses	
Total Income		Total Expenses	

**(Only complete if you wish to have other income considered as a loan repayment source)*

Cash & Deposits			
Name of Credit Union or Bank	Amount	Are these pledged as collateral?	Comments
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	

401K & Retirement Accounts		
Account Owner's Name	Amount	Comments

Stocks, Bonds and Investments (Publicly Traded)				
Name of Issuer or Symbol	Market Value	Number of shares	Price per share	Comments

Business Ownership Interests (Privately held)			
Business Name	Market Value	Ownership %	Comments

Account & Note Receivables (People or businesses that owe you money)		
Borrower's Name	Amount Owed	Comments

Real Estate (attach additional schedules as needed)					
Homestead or Investment					
Address					
Market Value					
Loan Balance					
Monthly Loan Payment					
Monthly Rental Income					
Year Acquired					

Other Assets (all assets that are not already reported in other sections)		
Type	Value	Comments

Debt			
Name of Credit Union or Bank	Current Loan Balance	Loan Payment	Collateral / Comments

Authorization
<p>I (we) hereby affirm that the foregoing information referenced or contained in this financial statement is presented for the purpose of obtaining, establishing or maintaining credit and as of the date indicated the information is true, complete and correct. Furthermore, the undersigned warrants that 5Point Credit Union may consider this statement as continuing to be true, correct and complete until a written notice provided by the undersigned. I (we) understand 5Point Credit Union is relying on this statement of my financial condition in making or reviewing loan(s) to me or to a business. 5Point Credit Union or its designee is authorized to make any investigation of my credit or employment status either directly or through any agency employed by 5Point Credit Union for that purpose now and in the future. 5Point Credit Union may disclose to any other interested parties 5Point Credit Union's experience with this account. I (we) agree to inform 5Point Credit Union immediately of any matter which will cause any material change to my financial condition. I (we) understand that 5Point Credit Union will retain this financial statement whether or not credit is granted.</p> <p style="text-align: center;"> Applicant's Signature: _____ Date: _____ </p> <p style="text-align: center;"> Spouse's Signature (if applicable): _____ Date: _____ </p>