

**PERSONAL FINANCIAL STATEMENT**

**Date**

IMPORTANT: Read these directions before completing this Statement, and check (✓) the appropriate box below.

- If 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 the basis for repayment of the credit requested, complete only Sections A and C.
- If you intend to apply for joint credit with another person, please initial here \_\_\_\_\_ & complete all Sections providing information in Section B about the joint applicant.
- If you are applying for individual credit, but are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all Sections, providing information in Section B about the person whose alimony, support or maintenance payments or income or assets you are relying.
- If this statement relates to your guaranty of the indebtedness of other person(s), firms(s) or corporation(s), complete Section A and C.

AMOUNT REQUESTED	PAYMENT DATE DESIRED	PROCEEDS OF CREDIT TO BE USED FOR
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SECTION A - INDIVIDUAL INFORMATION (Type or Print)	SECTION B - OTHER PARTY INFORMATION (Type or Print)
E-Mail Address	E-Mail Address
Social Security #	Social Security #
Name	Name
Residence Address	Residence Address
City, State & Zip	City, State & Zip
Position or Occupation	Position or Occupation
Business Name	Business Name
Business Address and Phone Number	Business Address and Phone Number
City, State & Zip	City, State & Zip
Res. Phone	Res. Phone
Name and address of nearest relative (Not living with you)	Name and address of nearest relative (Not living with you)

SECTION C - STATEMENT OF FINANCIAL CONDITION			
ASSETS (Do not include assets of doubtful value)	In Dollars (Omit cents)	LIABILITIES	In Dollars (Omit Cents)
Cash on hand and in banks (see summary)		Notes payable to banks - secured	\$ - -
U.S. Gov't & Marketable Securities-See Schedule A		Notes payable to banks - unsecured	
Non-Marketable Securities - see Schedule B		Brokerage Acct - Margin Balance	
Securities held by broker in margin accounts		Amounts payable to others - secured	
Restricted or control stocks		Amounts payable to others - unsecured	
Partial interest in Real Estate Equities - see Schedule C		Accounts and bills due	
Real Estate Owned - see Schedule D		Unpaid income tax	
Loans Receivable		Other unpaid taxes and interest	
Automobiles		Real estate mortgages payable - see Schedule D	
Cash value-life insurance - see Schedule E		Charge Cards	
Personal Property		Other debits - itemize:	
Retirement Accounts		Other debits - itemize:	
Business Inv. - Equity		Other debits - itemize:	
Other Assets - Itemize:			
Other Assets - Itemize:		TOTAL LIABILITIES	\$ - -
Other Assets - Itemize:		NET WORTH	
TOTAL ASSETS	\$ -	TOTAL LIABILITIES AND NET WORTH	

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.  
 Alimony, child support, separate maintenance received under:  Court Order Written Agreement  Oral Understanding



ANNUAL INCOME		CONTINGENT LIABILITIES	
SOURCES OF INCOME FOR YEAR ENDED		Do you have any contingent liabilities? If so, describe.	
Salary, bonuses & Commissions	\$		
Dividends	\$		
Real Estate Income	\$		
Other Income	\$	As Endorser, co-maker or guarantor?	\$
	\$	On Lease Contracts?	\$
	\$	Legal claims?	\$
	\$	Other Special debt?	\$
<b>TOTAL</b>	\$ -	Amount of contested income tax liens	\$

**PERSONAL INFORMATION**

PLEASE USE SEPARATE SHEET FOR ADDITIONAL DETAILS

Is any income listed likely to be reduced prior to loan being paid off?  NO  Yes - Explain

Are you a partner or officer in any other venture? If so, Describe:

Are you obligated to pay alimony, child support or separate maintenance payments? If so, Describe:

Are any assets pledged other than as described on schedules? If so, Describe:

Income tax settled through (Date)

Are you a defendant in any suites or legal actions?

Personal bank accounts carried at:  
 Savings Account No: \_\_\_\_\_ Checking Account No: \_\_\_\_\_  
 Savings Account No: \_\_\_\_\_ Checking Account No: \_\_\_\_\_

Have you ever been declared bankrupt in the last 10 years?  NO  Yes - Explain Year:

**DEPOSIT ACCOUNTS**

Institution Name	Type of account	Account held in name of	Balance
			\$ -
<b>TOTAL</b>			<b>\$ -</b>

Enter Total in Section C Line 1, Page 1

**SCHEDULE A - U.S GOVERNMENT & MARKETABLE SECURITIES**

Number of Shares or Face Value (Bonds)	Description	In Name of:	Are these Pledged?	Market Value
				\$ -
<b>TOTAL</b>				<b>\$ -</b>

Enter Total in Section C Line 2, Page 1

**SCHEDULE B - NON-MARKETABLE SECURITIES**

Number of Shares	Description	In Name of	Are These Pledged?	Value
				\$ -
<b>TOTAL</b>				<b>\$ -</b>

Enter Total in Section C Line 3, Page 1

**SCHEDULE C - PARTIAL INTERESTS IN REAL ESTATE EQUITIES**

Address & Type of property	Title in Name of:	% of ownership	Date Acquired	Original Cost &	Mortgage Maturity	Mortgage Amount	Payment \$
				Current Market Value			

Enter Total in Section C Line 6, Page 1

**BUSINESS INVESTMENTS**

Business Entity	Ownership	Total Assets	Total Liabilities	% of Ownership	Equity
					\$ -
<b>TOTAL</b>					\$ -

Enter Total in Section C Line 13, Page 1

**SCHEDULE D - REAL ESTATE OWNED**

Address & Type of Property	Title in Name of:	Date Acquired	Original Cost &	Mortgage Maturity	Mortgage Amount	Payment \$
			Current Market Value			

**If Real Estate Taxes are escrowed please indicate so by using an "E" next to the payment amount.**

Enter Total in Section C Line 7, Page 1

**SCHEDULE E - LIFE INSURANCE CARRIED, INCLUDING CROUP INSURANCE**

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Surrender Cash Value
					\$ -
<b>TOTAL</b>					\$ -

Enter Total in Section C Line 10, Page 1

**SCHEDULE F - BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED**

Name & Address of Lender	Credit in the name of:	Original Date	High Credit	Current Balance	Payment



**SECTION D - SECURED CREDIT (Complete only if credit is to be secured)**

Briefly describe the property to be given as security: \_\_\_\_\_

List names and address of all co-owners of the property:

Name

Address

If the Security is real estate, give the full name of co-owner (If any):

**FINANCIAL INSTITUTIONS WHERE CREDIT HAS BEEN OBTAINED**

Financial institution name	Type of loan obtained	Year obtained

The information contained in this statement provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either individually 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. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my/our credit worthiness. To the extent permitted by the law, you are authorized to answer questions about your credit experience with me/us, subject to any right I/we may have to prohibit sharing of information.

This is being provided to Security Financial Bank.

Signature (Individual) \_\_\_\_\_ Date \_\_\_\_\_

Signature (Individual) \_\_\_\_\_ Date \_\_\_\_\_

Date of Birth \_\_\_\_\_

Date of Birth \_\_\_\_\_

Driver's License # \_\_\_\_\_

Driver's License # \_\_\_\_\_

**PLEASE REMEMBER TO SIGN**

**IMPORTANT:** This form contains confidential information and should not be sent via a regular email attachment. Please complete this form, save it and then send it through our Secure File upload on our website: [www.sfbank.com](http://www.sfbank.com).

