

Date of Statement:

Applicant			Co-Applicant		
Name			Name		
Home Address			Home Address		
Email			Email		
Phone	SSN	DOB	Phone	SSN	DOB

Please indicate ownership of assets: J=Joint: A=Applicant: C=Co-Applicant

Assets	Amount(s)	Liabilities	Amount(s)
Cash and Depository Accounts (Sch. A)		Accounts Payable	
Stocks and Bonds (Sch. B)		Life Insurance Loans (Sch. D)	
IRA, Keogh, Profit Sharing/SEP's, etc. (Sch. C)		Unsecured Loans (Including Credit Cards)	
Net Cash Value of Life Insurance (Sch. D)		Vehicle Loans	
Residential Real Estate (Sch. E)		Residential Mortgage Debt (Sch. E)	
Commercial Real Estate (Sch. F)		Commercial Mortgage Debt (Sch. F)	
Business Interests (Sch. G)		Business Interests Debt (Sch. G)	
Accounts and Notes Receivable		Margin Accounts	
Vehicles		Taxes Payable	
Personal Property		Student Loan Debt	
Other Assets (list)		Other Liabilities (List)	
		Total Liabilities	
		Net Worth	
Total Assets		Total Liabilities & Net Worth	

Contingent Liabilities (Liability as guarantor or cosigner for loans of others)		
Borrower (*attach a separate sheet with detail, if necessary)	Current Balance	Monthly Payment

Schedule A – Cash and Depository Accounts (Attach separate sheet if necessary)		
Depository Institution	Owner(s)	Average Amount

Schedules B & C – Stocks and Bonds, IRA, Keogh, Profit Sharing (Attach separate sheet if necessary)				
Description	Owner	Where Held	Market Value	Pledged? (Y/N)

Schedule D – Life Insurance			
Insurance Company	Face Amount	Beneficiary	Cash Surrender Value

Schedule E – Residential Real Estate Owned (Attach separate sheet if necessary)						
Property Address	% Owned	Purchase Price	Market Value	Loan Balance	Monthly Payment	Lender

Schedule F – Commercial Real Estate Owned (Attach separate sheet if necessary)						
Owner	Address	Purchase Price	Market Value	Loan Balance	Monthly Payment	Lender

Schedule G – Business Interests (Attach separate sheet if necessary)						
Business Name	Legal Structure	% Owned	Annual Income	Total Assets	Total Liabilities	

Additional Questions: Please answer Yes or No where applicable	
1. Income tax returns filed through (year): _____	
2. Are any returns currently being audited or contested? _____ If yes, what year(s): _____	
3. Are any of your tax obligations past due? _____ If yes, what amount: _____	
4. Have you or any business that you were a major owner ever declared bankruptcy? _____ If yes, include explanation	
5. Are there any lawsuits or legal actions pending against you or an affiliated company?	
6. Have you drawn a will? _____ Name of executor(s): _____	

By signing this form, I certify under penalty of criminal prosecution that all information on this form and any additional supporting information submitted with this form is true and complete to the best of my knowledge. I understand that the Lender will rely on this information when making decisions regarding an application for a loan. I authorize the Lender to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness.

Signature	Print Name	Date
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Signature	Print Name	Date
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