

Personal Financial Statement

This statement and any applicable supporting schedules may be completed jointly if the co-applicant's assets and liabilities can be meaningfully and fairly presented on a combined basis, otherwise separate statements and schedules must be provided. If this document is being completed as supplemental information for an unsecured individual loan, you do not need to complete any information concerning a co-applicant. However, if another person will be permitted to use the account, or you wish for the other person's income to be relied upon as the basis for repayment than the co-applicant information should be completed.

SBA loan applicants only: If applying individually, you must include the assets of any spouse and minor children. As a Special Purpose Credit Program under the Equal Credit Opportunity Act, the SBA requires this information for program eligibility purposes. This does not require you to become a borrower on this credit.

Existing PFS Attached

SCHEDULE 1 - APPLICANT DATA & ANNUAL INCOME

	Applicant		Co-applicant
Full Legal Name		Full Legal Name	
Current Street Address		Current Street Address	
Current City/State/Zip		Current City/State/Zip	
Since (Mo/Year)	Own Rent Other	Since (Mo/Year)	Own Rent _ Other
Social Security #	Date of Birth	Social Security #	Date of Birth
Marital Status	Unmarried _ Married Separated	Marital Status	Unmarried Married Separated
Primary Phone	Is this a Cell Phone**	Primary Phone	Is this a Cell Phone**
Email Address		Email Address	
Employment Status		Employment Status	
Employer/Business		Employer/Business	
Position/Title		Position/Title	
Since (Mo/Yr)	Employer's Phone	Since (Mo/Yr)	Employer's Phone
Employment Income	Other income	Employment Income	Other income
Tax Filing Status		Tax Filing Status	

**Cellular Phone Contact Policy: By providing us with a telephone number for a cellular phone or other wireless device, including a number that you later convert to a cellular number, you are expressly consenting to receiving communications – including but not limited to precorded or artificial voice message calls, made by an automatic telephone dialing system – from us or our affiliates and agents at that number. This express consent applies to each such telephone number that you provide to us now or in the future and permits such calls for non-marketing purposes. Calls and messages may incur access fees from your Cellular provider.

Answer questions Yes or No	Applicant	Co-applicant	Answer questions Yes or No	Applicant	Co-applicant
Are you a Co-Maker, Endorser, or Guarantor of any other personal debt? If	C Yes	🗌 Yes	Do you have a trust?	Yes	🗌 Yes
Yes, explain on addendum.	No	No		No	No
Are you, or have you ever been, the defendant in any suit or legal action? If	Yes	🗌 Yes	Are you a citizen of the United States?	Yes	🗆 Yes
Yes, explain in comments at the bottom.	No	□ No		No	No
Have you ever filed bankruptcy, foreclosure, or had a judgment against you? If Yes, which one, explain in	Yes	🗌 Yes	List all countries of citizenship other than the United States:		
comments at the bottom.	No	No			

SCHEDULE 2 - LIQUID ASSETS: CASH, SAVINGS, CD'S, STOCKS, BONDS, MUTUAL FUNDS, ETC.

(For retirement assets, see Schedule 3)

Name of Bank or Financial Institution	Owner	Type of Account	Account Balance
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
		Total \$	\$ -

SCHEDULE 3 - RETIREMENT ACCOUNTS: 401(K)'S, IRA'S, PENSIONS, PROFIT SHARING, ETC.

Mame of Financial Institution
Owner
Type of Acct
Account Balance
Vested Balance
Loans

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		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
	Total \$	\$ -	\$ -	\$ -

SCHEDULE 4 - HOMES & RELATED EQUITY LOANS

	Prir	nary Home A	ddress	;			Sec	ondary Home	Address	
Address						Address				
(Mo/Yr) Acquired						(Mo/Yr) Acquired				
Purchase Price	\$				-	Purchase Price	\$			-
Current Market Value		\$			-	Current Market Value		\$		-
Mortgage Creditor						Mortgage Creditor				
Maturity Date						Maturity Date				
First Mortgage Balance		\$			-	First Mortgage Balance		\$		-
Monthly Payment (Princ	& Int)	\$	-	Mo. Taxes & Ins	\$ -	Monthly Payment (Princ &	Int)	\$	- Mo. Taxes & Ins	\$-
Monthly HOA Fees	\$				-	Monthly HOA Fees	\$			-

Additional Lines/Loans on Home(s)	Creditor	Line of Cre	dit Limit	Current Balance	Monthly Payment		
			\$	-	\$	\$	-
			\$	-	\$-	\$	-
			\$	-	\$-	\$	-
			\$	-	\$	\$	-
		Total \$	\$	-	\$-	\$	-

Do you have additional real estate holdings?

Yes 🗌 No

SCHEDULE 5 - CREDIT CARDS, LOANS, LINES OF CREDIT, LEASES, & STUDENT LOANS (including in Deferment)

Creditor	Collateral	Credit Type (line, term, cc, lease)	Date of Maturity	Limit		Current Balance		Limit Current Balance		Mo Pa	Monthly Payment	
				\$	-	\$	-	\$	-			
				\$	-	\$	-	\$	-			
				\$	-	\$	-	\$	-			
				\$	-	\$	-	\$	-			
				\$	-	\$	-	\$	-			
				\$	-	\$	-	\$	-			
				\$	-	\$	-	\$	-			
			Total \$	\$	-	\$	-	\$	-			

SCHEDULE 6 - LIFE INSURANCE INFORMATION

Insurance Company	Insured	Insured Insurance Policy Beneficia						Loans
				\$-	\$ -	\$ -		
				\$-	\$	\$ -		
				\$-	\$ -	\$ -		
				\$-	\$ -	\$-		
						\$ -		

SCHEDULE 7 - Other e.g. Alimony, Child Support Payments, Other Credit Accounts, Taxes Due

Payee	Description	Monthly Payment	Current Balance	
		\$-	\$-	
		\$-	\$ -	
		\$-	\$-	
		\$-	\$-	
		\$-	\$-	
	Total \$	\$-	\$ -	

Assets			Liabilities		
Liquid Assets (Schedule 2)	ę	ş -	Retirement Account Loans (Schedule 3)	\$	-
Vested Retirement Accounts (Schedule 3)		ş -	Mortgages on Residences (Schedule 4)	\$	-
Primary and Secondary Homes (Schedule 4)		ş –	HELOC/Equity Loans on Residences (Schedule 4)	\$	-
Life Insurance Cash Value (Schedule 6)		ş -	Credit Cards, Loans & Lines of Credit (Schedule 5)	\$	-
Investment Real Estate/Other Real Estate (RE Addendum)		ş -	Insurance Loans (Schedule 6)	\$	-
Net Value of Your Ownership Interest in Business	9	5 -	Other (Schedule 7)	\$	-
Automobiles		ş -	Investment Real Estate Mortgages (RE Addendum)	\$	-
Loans due to me		ş -	Other Liabilities (Describe):		
Personal Property (Art, Jewelry, Household goods, etc.)	5	ş -		\$	-
Other Assets (Describe):				\$	-
	9	5 -		\$	-
		ş -		\$	-
		ş -		Total \$ \$	-
То	otal \$	\$			
	Net	ş -			

AUTHORIZATION: I certify that the information provided in this statement is complete, true and correct as of the date signed. So long as I owe any sums to the Bank, I agree to give the Bank prompt written notice of any material change in my financial condition, and upon request, agree to provide the Bank with an updated personal financial statement. The bank is authorized to obtain credit reports and make inquiries to review/validate credit, employment history or any other information contained within this document from time to time. The bank is further authorized to retain this personal financial statement and may use information contained in this document to create a financial plan. This document does not constitute a credit application and does not obligate the Bank to provide credit.

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT: To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may ask to see your driver's license or other identifying documents.

Applicant

Date

Co-applicant

Date

CR-18518459 3.16.2020