

## Personal Financial Statement

Financial Statement as of: \_\_\_\_\_

You may apply for an extension of credit individually or jointly with another applicant. This statement and any applicable supporting schedules may be completed jointly by co-applicants if their assets and liabilities can be meaningfully and fairly presented on a combined basis, otherwise separate statements and schedules must be provided.

Applicant				Co-Applicant			
				(includes Applicant's spouse)			
Relationship to Applicant							
Full Name (please print)		Date of Birth		Full Name (please print)		Date of Birth	
Physical Address				Physical Address			
City		State	Zip Code	City		State	Zip Code
Mailing Address				Mailing Address			
City		State	Zip Code	City		State	Zip Code
Phone Number	Email Address			Phone Number	Email Address		
Social Security Number		US Citizen?		Social Security Number		US Citizen?	
Government Issued ID (Driver's License, Military ID, State ID)				Government Issued ID (Driver's License, Military ID, State ID)			
Type	Number	State/Country	Expiration Date	Type	Number	State/Country	Expiration Date
Employed By				Employed By			
Business Address			Daytime Phone	Business Address			Daytime Phone
Type of Business	Position	How Long		Type of Business	Position	How Long	

Note: Income received from child support, alimony or maintenance is optional information furnished only if you desire this income to be considered in the evaluation of your application.

Fixed or Average Salary	Amount of Other Income	Fixed or Average Salary	Amount of Other Income
\$ _____ Per _____	\$ _____	\$ _____ Per _____	\$ _____
Source of Other Income (Rentals, Dividends, etc.)		Source of Other Income (Rentals, Dividends, etc.)	
Name of Primary Financial Institution		Name of Primary Financial Institution	

**Applicant and Co-Applicant, specify if assets and liabilities are individual (I) or joint (J).**

Assets	I/J	In even dollars	Liabilities	I/J	In even dollars
Cash on hand and in banks		\$	Notes Payable to Banks & Others (Section E)		\$
Investments: Stocks, Bonds Etc. (Section A)		\$	Accounts Payable (Section F)		\$
Real Estate (Section B)		\$	Real Estate Mortgages (Section B)		\$
Retirement Accounts		\$	Installment Accounts		\$
Accounts & Notes Receivable (Section C)		\$	Unpaid Income Taxes		\$
Cash Value Life Insurance (Section D)		\$	Credit Cards (Outstanding Balance)		\$
Automobiles Make Year		\$	Other Liabilities		\$
Make Year		\$	Contingent Liabilities (Section G)		\$
Jewelry		\$	Other:		\$
Household Goods		\$	Total Liabilities		\$
Other:		\$	Net Worth		\$
Total Assets		\$	Total Liabilities and Net Worth		\$

**Details relative to assets and liabilities (attach supplemental list if necessary)**

**Section A - Investments, Marketable Securities, Stocks, Bonds**

List securities	Title in Name of	Pref. or common	No. of Shares	Market Value	Shares Pledged	Where
				\$		
				\$		
				\$		
				\$		
				\$		
				\$		
TOTAL				\$		

**Section B - Real Estate Owned**

**Real Estate Type: SF= Single Family, A= Apartments, C= Com**

Address	RE Type	Title in Name of	Date Aquired	Original Cost	Present Mkt. Value	Mortgages		
						Balance	Mo. Pmt.	Lender
				\$	\$	\$	\$	
				\$	\$	\$	\$	
				\$	\$	\$	\$	
				\$	\$	\$	\$	
				\$	\$	\$	\$	
				\$	\$	\$	\$	
				\$	\$	\$	\$	
TOTAL				\$	\$	\$	\$	

**Section C - Account and Notes**

Accounts and Notes Receivables - From	Amount Due	Maturity	Payment Schedule	Security (if any)
	\$			
	\$			
TOTAL		\$		

**Section D - Life Insurance**

Life Insurance Company	Owner	Face Amount	Beneficiary	Type of Insurance	Cash Value	Amount of Policy
		\$			\$	\$
		\$			\$	\$
TOTAL		\$			\$	\$

**Section E - Notes Payable to Banks and Others**

Notes Payable - To	Amount	Mo. Payment	Date Made	Date Due	Purpose
	\$	\$			
	\$	\$			
TOTAL		\$			

**Section F - Accounts Payable**

Accounts Payable - To	Amount	Date Made	Date Due	Purpose
	\$			
	\$			
TOTAL		\$		

## Section G - Contingent Liabilities

(Debtor)	Yes	No	Amount
Are you a guarantor, co-maker, or endorser for any debt of an individual, corporation or partnership?			\$
Do you have any outstanding letters of credit or surety bonds?			\$
Are there any suits or legal actions pending against you?			\$
Are you contingently liable on any lease or contract?			\$
Income Tax Returns Filed through <input type="text"/> Are any returns currently being audited or contested?			\$
Have you or any firm in which you were a major owner ever declared bankruptcy?			\$
What would be your total estimated tax liability if you were to sell your major assets?			\$
<b>TOTAL</b>			\$
If yes for any of the above, please explain: <input type="text"/>			

### Cash income and expenditures statement for the end of the year:

Annual Income	In even dollars	Annual Expenditures	In even dollars
Gross Salary (applicant)	\$	Federal income and other taxes	\$
Gross Salary (co-applicant)	\$	State income and other taxes	\$
Bonuses and commissions	\$	Rental payments, co-op, or condo maintenance	\$
Rental income	\$	Mortgage payments	\$
Interest income	\$	Property taxes	\$
Dividend income	\$	Interest and principal payments on loans	\$
Capital gains	\$	Insurance	\$
Partnership income	\$	Investments (including tax shelters)	\$
Other investment income	\$	Alimony/child support	\$
Other income (List Below)	\$	Tuition	\$
	\$	Medical expenses	\$
	\$	Other expenses: <input type="text"/>	\$
	\$	Other expenses: <input type="text"/>	\$
<b>TOTAL INCOME</b>		<b>TOTAL EXPENDITURES</b>	
	\$		\$

Any significant changes expected in 12 months? Yes No (if yes, attach information)

Income received from child support, alimony, or maintenance is optional information furnished only if you desire this income to be considered in the evaluation of your application.

### STATEMENT OF INTENT TO OBTAIN CREDIT AS JOINT APPLICANTS / GUARANTORS

We understand that you intend to make other joint applications in the future and request that we keep this statement on file to be used for future requests. Please mark the appropriate box.

Yes, we are applying for joint credit in both our names.

No, the request is for single individual listed under Applicant

This financial statement is submitted for the purpose of procuring, establishing, and maintaining credit on behalf of the undersigned or persons, firms or corporations on whose behalf the undersigned may either severally or jointly with others execute a guaranty in Global Federal Credit Union's favor. The undersigned authorizes Global Federal Credit Union and its affiliates to share with each other all information provided herein or in any credit bureau report, or experience or other information regarding the undersigned. The undersigned warrants that this financial statement is true and correct and authorizes Global Federal Credit Union to obtain information concerning any statements made herein.

1. Applicant signature:	Date:
2. Co-Applicant signature:	Date: