

# Personal Financial Statement

Dated: \_\_\_\_\_

**Type of Credit Requested:**

(Please choose one from each line)

Secured Credit     Unsecured Credit   
 Individual Credit     Joint Credit

I may apply for a credit extension, loan or other financial accommodation alone or together with someone else ("Co-Applicant"). If I apply with a Co-Applicant and our combined assets and debts can meaningfully and fairly be presented together, the Co-Applicant and I may complete this required statement and any supporting schedules jointly. Otherwise separate forms and schedules are required.

Applicant				Co-Applicant													
Full Name				Full Name													
Street Address				Street Address													
City / State / Zip				City / State / Zip													
County				County													
Since	Own	<input type="checkbox"/>	Rent	<input type="checkbox"/>	\$ ____/Mo.	Since	Own	<input type="checkbox"/>	Rent	<input type="checkbox"/>	\$ ____/Mo.						
Social Security #			Date of Birth			Social Security #			Date of Birth								
Phone: Residence			Work			Phone: Residence			Work								
Employer				Employer													
Address				Address													
Position / Title			Since			Position / Title			Since								
Dependents (Include Self & Ages)						Dependents (Include Self & Ages)											
Marital Status *		Unmarried	<input type="checkbox"/>	Married	<input type="checkbox"/>	Separated		<input type="checkbox"/>	Marital Status *		Unmarried	<input type="checkbox"/>	Married	<input type="checkbox"/>	Separated		<input type="checkbox"/>

**\*Do not provide this information if your application is for individual, unsecured credit**

**Please Complete Schedules 1 - 8 before this section.**

Date of Valuation \_\_\_\_\_ (Attach separate sheets if more space is needed)

Assets	Joint-J Sole-S	Amount (\$)	Liabilities	Joint-J Sole-S	Amount (\$)
Cash (Schedule 1)			Loans Payable to Banks (Include Credit Cards) (Schedule 7)		
Securities (Schedule 2)			Short Term Notes Due to Others		
Value of My Companies (List)			Insurance Loans (Schedule 3)		
Life Insurance Cash Value (Schedule 3)			Installment Loans and Contracts		
Homestead (Schedule 5)			Mortgages on My Home (Schedule 5)		
Other Real Estate (Schedule 5)			Mortgages on Other Real Estate (Schedule 5)		
Mortgages and Contracts I Own (Schedule 4)			Taxes (Federal & State)		
Profit Sharing, Pension & IRA Accounts(Schedule 6)			Loans Against Retirement Accounts (401K, IRA, etc.)		
Automobiles (Describe)			Other Liabilities (Describe)		
Personal Property					
Other Tangible Assets (Describe)					
			<b>Total Liabilities \$</b>		<b>0</b>
		<b>Total Assets \$</b>	<b>0 (Total Assets Less Total Liabilities)</b>		<b>Net Worth \$</b>
					<b>0</b>

## Personal Financial Statement

Contingent Liabilities (Schedule 8)		Available Credit Lines (Excluding Credit Cards) (Schedule 7)	
Annual Income	Amount (\$)	Annual Expenditures	Amount (\$)
Salary (Applicant)		Federal Income and Other Taxes	
Salary (Co-Applicant)		State Income and Other Taxes	
Bonuses & Commissions (Applicant)		Rental Payments, Co-op or Condo Maintenance	
Bonuses & Commissions (Co-Applicant)		Mortgage Payments Residential (Schedule 5)	
		Investment (Schedule 5)	
Rental Income (Schedule 5)		Property Taxes Residential	
		Investment	
Interest Income		Interest & Principal Payments on Loans	
Dividend Income		Insurance (including Auto / Home / Life / Disability / Other)	
Capital Gains		Investments (Including tax shelters)	
Partnership Income		Alimony / Child Support	
Other Investment Income		Tuition	
Other Income (List)**		Other Living Expenses	
		Medical Expenses	
		Other Expense (List)	
<b>Total Income \$</b>	<b>0</b>	<b>Total Expenditures \$</b>	<b>0</b>

\*\* Income from 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.

CASH, SAVINGS, CERTIFICATES AND MONEY MARKET ACCOUNTS					
Name of Bank, Financial Institution or Brokerage Firm	Type of Account	In Whose Name ?	Pledged?		Account Balance (\$)
			Yes	No	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
<b>Total (\$)</b>					

SECURITIES OWNED								
Number of Shares or Bond Amount	Description	Pledged?		In Whose Name(s) Registered?	Cost (\$)	Present Market Value (\$)	Exchange Listed-L Unlisted-U	Controlled-C Restricted-R
		Yes	No					
		<input type="checkbox"/>	<input type="checkbox"/>					
		<input type="checkbox"/>	<input type="checkbox"/>					
		<input type="checkbox"/>	<input type="checkbox"/>					
		<input type="checkbox"/>	<input type="checkbox"/>					
<b>Total (\$)</b>						<b>0</b>		

LIFE INSURANCE					
Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy (\$)	Loans (\$)
<b>Total (\$)</b>			<b>0</b>	<b>0</b>	<b>0</b>

RECEIVABLES, MORTGAGES AND / OR CONTRACTS I OWN						
Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Repayment Terms		Balance Due (\$)
				per		
				per		
				per		
<b>Total (\$)</b>						<b>0</b>

## Personal Financial Statement

REAL ESTATE OWNED											
PERSONAL RESIDENCE Property Address	Legal Owner	Purchase		Market Value	Present Loan Bal.	Interest Rate	Loan Maturity Date	Monthly Rental Income	Monthly Payment(s)	Lender	
		Yr	Price								
<b>Total (\$)</b>				<b>0</b>							
INVESTMENT / PARTNERSHIPS Property Address	Owner-ship %	Legal Owner	Purchase		Market Value	Present Loan Bal.	Interest Rate	Loan Maturity Date	Monthly Rental Income	Monthly Payment(s)	Lender
			Yr	Price							
<b>Total (\$)</b>				<b>0</b>							

PROFIT SHARING, PENSION, AND IRA ACCOUNTS (INCLUDES 401 K)				
Name of Institution or Plan	Type of Acct	Account Balance (\$)	Amount Totally Vested (\$)	Loans (\$)
<b>Total (\$)</b>			<b>0</b>	<b>0</b>

LOANS PAYABLE TO BANKS & OTHERS (INCLUDE CREDIT CARDS)							
To Whom Payable	Address	Interest Rate	Describe Collateral or indicate if Unsecured	How Payable		Maturity Date	Unpaid Balance (\$)
				Amount (\$) Owed	Per		
<b>Total (\$)</b>				<b>0</b>			<b>0</b>

CONTINGENT LIABILITIES									
Are you a co-maker, endorser or guarantor on any debts, leases or other obligations?					Applicant		Co-Applicant		Amount (\$)
					Yes	No	Yes	No	
If Yes:					To Whom Payable		Terms		Maximum Liability
Have you or any firm in which you were a major owner ever declared bankruptcy or had a judgement against you?									
Are any assets pledged or debts secured except as shown?									
Have you drawn a will?									
Have you ever had a financial plan prepared for you?									
Income tax returns are filed through (date):									
Are any returns currently being contested?					Yes	No	If Yes, what year(s):		
Do you have outstanding Letters of Credit or Surety Bonds?									
Are there any suits or legal actions pending against you?									
Are any of your tax obligations past due?									
What would be your total estimated tax liability if you were to sell your major assets?									
If yes for any of the above, give details:									

# Personal Financial Statement

Amount Requested or Guaranteed:

Purpose of Loan or Guaranty for:

## Representations and Warranties

The information contained in this statement is provided to induce the bank (Crown Bank "bank or "creditor") to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledge and understand that the bank are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. **Each of the undersigned represents, warrants and certifies that the information provided herein is true, correct and complete.** Each of the undersigned agrees to notify the bank immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to the bank. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. If the undersigned fail to notify the bank as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, you may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, immediately due and payable. The bank is authorized to make all inquiries the bank deems necessary to verify the accuracy of the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorize any person or consumer reporting agency to give the bank any information it may have on the undersigned. Each of the undersigned authorizes the bank to answer questions about your credit experience with the undersigned. As long as any obligation or guarantee of the undersigned to the bank is outstanding, the undersigned shall supply annually an updated financial statement. This personal financial statement and any other financial or other information that the undersigned give the bank shall be the bank's property.

**NOTICE:** The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age(providing the applicant has the capacity to enter into a binding contract) because all or part of the applicant's income derives from and public assistant program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act, the federal agency that administer compliance with this law concerning this credit is:

**FDIC Consumer Reponse Center  
1100 Walnut Street Suite 2100 Kansas City, MO 64106**

This information and the information provided on all accompanying financial statements and schedules is provided for the purpose of obtaining credit for the Applicant(s) or for the purpose of Applicant(s) guaranteeing credit for others. Applicant(s) acknowledge that representations made in this statement will be relied on by Creditor in its decision to grant such credit. This Statement is true and correct in every detail and accurately represents the financial condition of the Applicant(s) on the date given below. Creditor is authorized to make all inquiries it deems necessary, either directly or through any agency employed by Lender for that purpose, to verify the accuracy of the information contained herein and to determine the creditworthiness of the Applicant(s). Applicant(s) will promptly notify Creditor of any subsequent changes which would affect the accuracy of this Statement.

**\*\*\*\*THIS FINANCIAL STATEMENT MUST BE SIGNED! \*\*\*\***

**IF YOU ARE FILLING OUT AN ELECTRONIC VERSION, PLEASE SIGN AND MAIL, EMAIL OR FAX TO CROWN BANK**

\_\_\_\_\_  
Date

\_\_\_\_\_  
My Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Applicant signature (if you are requesting the financial accommodation jointly)