

## PERSONAL FINANCIAL STATEMENT

Date: \_\_\_\_\_

**CHECK AS APPLICABLE** - Applicant is applying for this loan:

ALONE, without a co-signer or guaranty of a relative or other person(s) or entity.

WITH A PERSON OR PERSONS who will also be contractually liable. Name of other Person(s): \_\_\_\_\_

We intend to apply for joint credit:      Applicant's Initials       Co- Applicant's Initials

Applicant Name: \_\_\_\_\_

Co-Applicant Name: \_\_\_\_\_

SSN: \_\_\_\_\_      DOB: \_\_\_\_\_

SSN: \_\_\_\_\_      DOB: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Phone # \_\_\_\_\_      Cell # \_\_\_\_\_

Phone # \_\_\_\_\_      Cell # \_\_\_\_\_

Email: \_\_\_\_\_

Email \_\_\_\_\_

Assets	Amount
Cash, Checking & Savings Accounts (Sch. A)	
Stocks, CDs & Mutual Funds (Sch. B)	
Qualified Investments (401K/IRA) (Sch. B1)	
Accounts Receivable	
Life Insurance/Cash Value (Sch. C)	
Other:	
Other:	

Liabilities	Amount
Credit Card and Installment Debt (Sch. F)	
Unsecured & Notes to Others	
Accounts Payable	
Judgements	
Other Liens:	
Other:	
Other:	

**TOTAL CURRENT ASSETS**

**TOTAL CURRENT LIABILITIES**

Vehicles & Equipment (Sch. D)	
R.E., Contracts & Business Invest. (Sch. E)	
Other:	
Other:	

Vehicle & Equipment Debt (Sch. G)	
Life Insurance Debt (Sch. C)	
Real Estate & Contract Debt (Sch. H)	
Other:	

**TOTAL LONG-TERM ASSETS**

**TOTAL ASSETS**

**TOTAL LONG-TERM LIABILITIES**

**TOTAL LIABILITIES**

**NET WORTH**

Annual Income	Amount
Salary or wages (Gross)	
Dividends & Interest	
Rentals (Gross Income)	
Business (Net Income)	
Other Income:	

Applicant Employer	
Length of Employment	
Co-Applicant Employer	
Length of Employment	

**TOTAL INCOME**

**ASSET SCHEDULES**

**Schedule A - Cash, Checking Accounts, Money Market & Savings**

<b>Account Type</b>	<b>Financial Institution</b>	<b>Ownership</b>	<b>Balance</b>
<b>TOTAL</b>			

**Schedule B - Stocks, CDs & Mutual Funds**

<b>Account Type</b>	<b>Institution, Stock or Fund Name</b>	<b>Margin (Y/N)</b>	<b>Balance</b>
<b>TOTAL</b>			

**Schedule B1 -Qualified Investments (401K/IRA)**

<b>Account Type</b>	<b>Institution, Stock or Fund Name</b>	<b>Balance</b>
<b>TOTAL</b>		

**Schedule C - Life Insurance**

<b>Name of Company</b>	<b>Beneficiary</b>	<b>Type</b>	<b>Face Value</b>	<b>Loan Amount</b>	<b>Cash Value</b>
<b>TOTAL</b>					

**Schedule D - Vehicles & Equipment**

<b>Year, Make &amp; Model</b>	<b>Value</b>	
<b>TOTAL</b>		

**Schedule E - Real Estate, Contracts & Business Investments**

<b>Property Location &amp; Details</b>	<b>Year Acquired</b>	<b>Cost</b>	<b>% Owned</b>	<b>Value</b>
<b>TOTAL</b>				

**LIABILITY SCHEDULES**

**Schedule F - Credit Card & Installment Debt**

Account Type	Financial Institution	% Rate	Payment	Balance
<b>TOTAL</b>				

**Schedule G - Vehicles & Equipment Debt**

Year, Make & Model	Financial Institution	% Rate	Payment	Balance
<b>TOTAL</b>				

**Schedule H - Real Estate, Contracts & Business Investment Debt**

Property Location & Details	Financial Institution	% Rate	Payment	Balance
<b>TOTAL</b>				

**PLEASE ANSWER EACH QUESTION (YES or NO)**

Are you a Co-Maker, Endorser, or Guarantor of any other person's debt?

Applicant      Co-Applicant

Are you a defendant in any suit or legal action?


Have you ever gone through bankruptcy or had a judgement against you in the last 10 years?

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I authorize Yellowstone Bank to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements may result in the forfeiture of benefits and possible prosecution by the U.S. Attorney General.

X \_\_\_\_\_  
Applicant

\_\_\_\_\_  
Date

X \_\_\_\_\_  
Co-Applicant

\_\_\_\_\_  
Date

