

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

Account Type	Financial Institution	Ownership	Balance
TOTAL			

Schedule B - Stocks, CDs & Mutual Funds

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

Schedule B1 -Qualified Investments (401K/IRA)

Account Type	Institution, Stock or Fund Name	Balance
TOTAL		

Schedule C - Life Insurance

Name of Company	Beneficiary	Type	Face Value	Loan Amount	Cash Value
TOTAL					

Schedule D - Vehicles & Equipment

Year, Make & Model	Value	
TOTAL		

Schedule E - Real Estate, Contracts & Business Investments

Property Location & Details	Year Acquired	Cost	% Owned	Value
TOTAL				

LIABILITY SCHEDULES

Schedule F - Credit Card & Installment Debt

Account Type	Financial Institution	% Rate	Payment	Balance
TOTAL				

Schedule G - Vehicles & Equipment Debt

Year, Make & Model	Financial Institution	% Rate	Payment	Balance
TOTAL				

Schedule H - Real Estate, Contracts & Business Investment Debt

Property Location & Details	Financial Institution	% Rate	Payment	Balance
TOTAL				

PLEASE ANSWER EACH QUESTION (YES or NO)

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

Applicant Co-Applicant

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

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?

<input type="checkbox"/>	<input type="checkbox"/>
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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

