

SOUTH COUNTY ECONOMIC DEVELOPMENT COUNCIL PERSONAL FINANCIAL STATEMENT FORM

You may apply for credit in your name alone, regardless of marital status. South County Economic Development Council will assume that all assets, debts, and income listed below are community property subject to your sole management and control, or to the joint management and control of you and your spouse, unless you otherwise indicate.

Check one of the following: Married Separated Unmarried You may apply for an individual account regardless of your marital status.

Check one of the following: Individual Account (in your name only) Joint Account with Spouse Joint with Other (Attach Application)

Personal Financial Statement as of _____, 20____
Month Day Year

PERSONAL FINANCIAL STATEMENT					
Name:		Date of Birth:		Social Security #:	
Home Address:		City:		State: Zip Code:	
How long at this address? <small>Years Months</small>	<input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Other:	Home Phone #:		Business Phone #:	
Employed by:		Occupation:		How Long? Yrs. Mos.	
Address:		City		State & Zip	
Drivers License #: Expires:		Place & Date of Issue:		Total Number of Dependents:	Ages:
Spouse Name:		Date of Birth:		Social Security #:	
Employed by:		Occupation:		How Long? Yrs. Mos.	Business Phone #:
Address:		City		State & Zip	
Drivers License #: Expires:		Place & Date of Issue:		Total Number of Dependents:	Ages:
Name of Reference			Address / Phone No.		

COMPLETE SCHEDULES "A" THROUGH "C" AND ENTER TOTALS HERE

ASSETS: <small>(List totals from Schedules)</small>	Market Value	LIABILITIES: <small>(List totals from Schedules)</small>	Balance Owing
Cash: Checking//Savings	\$	Notes Payable to Bank (Schedule C)	\$
Cash: Other Financial Institutions	\$	Notes/Loans Payable to Others (Schedule C)	\$
Stocks/Bonds/Marketable Securities - Current Market Value	\$	Bank Cards (Schedule C)	\$
Accounts/Notes Receivable	\$	Open & Revolving Accounts (Schedule C)	\$
Cash Value Life Insurance	\$	Real Estate Debt (Residence - Schedule A)	\$
Real Estate - Residence (Schedule A)	\$	Real Estate Debt - Unimproved Land (Schedule A)	\$
Real Estate - Unimproved Land (Schedule A)	\$	Real Estate - Other (Schedule A)	\$
Real Estate - Other (Schedule A)	\$	Loans / Lease secured by vehicles (Schedule C)	\$
Retirement Accounts	\$	Insurance Loans (Schedule C)	\$
Closely Held Business Interest(s) - Current Value	\$	Other (Schedule C)	\$
Personal Property (Schedule B)	\$	Taxes Owed:	\$
Vehicles (Schedule B)	\$	Total Liabilities/Payments:	\$
Tax Refund Due	\$	Net Worth (Total Assets less Total Liab.)	\$
Total Assets:	\$		

Schedule A – Real Estate (For ownership of rental income properties, include tax schedules or complete Schedule of Real Estate (Page 4))						
Address	Name(s) of Owner(s)	Date Acquired	Est. Value	Mnthly Pmts.	Amt. Owng	Mortgage or Lienholder
(For income properties, include tax schedules and recent rent roll details)			Totals:	\$		

Schedule B – Other Assets and Personal Property (Attached Supplemental Schedule, if necessary)							
Automobiles	Value	Rec. Veh. / Boats	Value	Personal Property	Value	Totals	
Yr. Make:	\$	Yr. Make: Ft.	\$	Furniture	\$	Subtotal Autos:	\$
Yr. Make	\$	Yr. Make Ft.	\$	Jewelry	\$	Subtotal R/Vs:	\$
Yr. Make	\$	Yr. Make Ft.	\$	Other:	\$	Subtotal Personal Property:	\$
						Total All Other Assets:	\$

Schedule C – Accounts, Bank Cards, Loans Payable and Other Liabilities (Attach Supplemental Schedule, if necessary)						
Payable to	Account No.	Collateral	How Payable		Balance Owed	
			\$	Per	\$	
			\$	Per	\$	
			\$	Per	\$	
			\$	Per	\$	
			\$	Per	\$	
					Total:	\$

INCOME AND EXPENSES					
Annual Income For Year:		Annual Expenses For Year:		Contingent Liabilities	
Applicant's Salary or Wages	\$	Real Estate Loan/Rent/Lease Pmts	\$	As Endorser on Note / Contracts	\$
Spouse's Salary or Wages	\$	Fed. & State Income Tax	\$	As Guarantor on Notes / Contracts	\$
Dividends or Interest	\$	Insurance Premiums (all types)	\$	For Taxes	\$
Rentals (Gross Income)	\$	Property Taxes & Assessments	\$	Other	\$
Business (Net Income)	\$	Alimony, Child Support or Separate Maintenance	\$		\$
Other Sources (Itemize)*	\$	Payments on Contracts / Notes	\$		\$
	\$	Estimated Living Expenses	\$		\$
Total Income:	\$	Total Expenditures:	\$	Total Contingencies:	\$

*Alimony, child support or separate maintenance income need not be stated unless you want it considered as a basis for repaying the obligation.

MANDATORY RESPONSE INFORMATION ON APPLICANT AND SPOUSE (Attach details for "yes" answers)

- Have you ever borrowed from any other branch of this institution? No Yes Where?
- Are any assets encumbered or debts secured, except as indicated above? No Yes
- Are there any lawsuits or unpaid judgements now pending against you? No Yes
- Have you ever voluntarily surrendered or had a vehicle or any other property repossessed? No Yes
- Have you or your spouse ever been the subject of bankruptcy proceedings in the last 14 years? No Yes
- Have you ever applied for or obtained credit under another name? No Yes If yes, please provide name: _____
- Are you a U.S. citizen? Yes No – If no, country of citizenship and visa status: _____
- Are any assets held in a trust? No Yes Revocable Irrevocable Name(s) of trustee(s): _____

SIGNATURE, CERTIFICATION AND AUTHORIZATION:

I (we) hereby affirm that the foregoing information contained in this financial statement is presented for the purpose of obtaining credit as of the date indicated and is true, complete and correct. I (we) understand that South County Economic Development Council ("Lender") is relying on this statement of my (our) financial condition in making loan(s) to me (us). Lender is authorized to make any investigation of my (our) credit or employment status either directly or through any agency employed by Lender for that purpose. I (we) agree to inform Lender immediately of any matter that will cause any significant change in my (our) financial condition. I (we) understand that Lender will retain this financial statement whether or not credit is granted.

X: _____ : _____
Applicant Date Co-Applicant (If joint loan or account) Date