

Personal Financial Statement

All individuals owning 20% or more of the business must complete this form and submit with the Business Loan/Credit Card Application



Phone: 802/800 371-5162

Fax: 802-225-1066

Email: info@vsecu.com

Contact Information

Name (*Last, First*): _____

Email: _____

Social Security #: _____ - _____ - _____ Date of Birth: ____/____/____

Home Phone #: _____

Business Phone #: _____

Present Address: ☐ Own ☐ Rent Years at Address: _____

Previous Address (*if at present address less than two years*):

☐ Own ☐ Rent Years at Address: _____

Employer: _____ Salary: _____

Position/Title: _____ Years with Employer: _____

Previous Employer: _____ Salary: _____
(*if at present employer less than two years*)

Position/Title: _____ Years with Employer: _____

Name (*Last, First*): _____

Email: _____

Social Security #: _____ - _____ - _____ Date of Birth: ____/____/____

Home Phone #: _____

Business Phone #: _____

Present Address: ☐ Own ☐ Rent Years at Address: _____

Previous Address (*if at present address less than two years*):

☐ Own ☐ Rent Years at Address: _____

Employer: _____ Salary: _____

Position/Title: _____ Years with Employer: _____

Previous Employer: _____ Salary: _____
(*if at present employer less than two years*)

Position/Title: _____ Years with Employer: _____

Income

Salary \$ _____ Net Investment Income \$ _____ Real Estate Income \$ _____

Other Income \$ _____ Describe details of other income: _____

Assets

Available Cash in Hand/Banks/Credit Unions \$ _____ ☐ Jointly Owned ☐ Individually Owned

Other Savings Account(s) \$ _____ ☐ Jointly Owned ☐ Individually Owned

IRA or Other Retirement Account(s) \$ _____ ☐ Jointly Owned ☐ Individually Owned

Securities (*Stocks and Bonds*) \$ _____ ☐ Jointly Owned ☐ Individually Owned

Life Insurance (*Cash Surrender Value*) \$ _____ ☐ Jointly Owned ☐ Individually Owned

Term Life Insurance (*No Cash Value*) \$ _____ ☐ Jointly Owned ☐ Individually Owned

Real Estate \$ _____ ☐ Jointly Owned ☐ Individually Owned

Automobile(s) \$ _____ ☐ Jointly Owned ☐ Individually Owned

Other Personal Property* \$ _____

Other Assets* \$ _____

TOTAL \$ _____

*Describe details of other personal property and assets:

Notes Payable to Banks, Credit Unions, and Others (auto, mortgages, etc.)

Name of Creditor	Original Balance	Current Balance	Payment Amount/ Frequency	Type of Collateral

List any other liabilities: _____

Real Estate Owned

Property Details	Property 1	Property 2	Property 3
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Payment Amount			
Property Taxes			
Insurance Company			

Authorization and Certification

I authorize VSECU, a division of New England Federal Credit Union to make inquiries as necessary to verify the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan.

Signature: _____

Date Signed: _____

Signature: _____

Date Signed: _____