



Personal Financial Statement

Section 1 – Individual Information		Section 2 – Other Party Information	
(Type or Print)		(Type or Print)	
Name		Name	
Address		Address	
City, State, & Zip		City, State, & Zip	
Occupation and Employer:		Occupation and Employer:	
Social Sec Number:		Social Sec Number:	
Date of Birth:		Date of Birth:	
Cell Phone:		Cell Phone:	
Res. Phone	Bus. Phone	Res. Phone	Bus. Phone

Assets	In Dollars	Liabilities	In Dollars
Cash on hand and in banks (see Sched. A)		Notes Payable to Banks -- Secured	
U.S. Gov't. & Marketable Securities (see Sched. B)		Notes Payable to Banks -- Unsecured	
Non-Marketable Securities (see Sched. B)		Credit cards (see Sched. F)	
Marketable Securities		Other Notes Payable to Banks -- Secured or Unsecured Not Above	
Partial interest in real-estate equities (see Sched. C)		Notes Payable to Others -- Secured	
Real-estate owned (see Sched. D)		Notes Payable to Others -- Unsecured	
Loans receivable		Accounts Payable and Bills Due	
Automobiles and other personal property		Unpaid Income Taxes	
Cash value – life insurance (see Sched. E)		Real-estate mortgages payable (see Sched. D)	
Other assets – itemize:		Other debts – itemize:	
		Total Liabilities	
		Net Worth	
Total Assets		Total Liabilities And Net Worth	

Sources of income for year ended _____, 20____		Personal Information
Salary, Bonuses, & Commissions	\$	Do you have a will? _____. If yes, then who is the executor?
Dividends	\$	Are you a partner or officer in any other venture? If yes, then please describe
Other Income	\$	
Total Income	\$	Are you obligated to pay alimony, child support, or separate maintenance payments? If yes, then please describe.
Contingent Liabilities		
Do you have any contingent liabilities? _____. If yes, then please describe on a separate sheet.		Are any assets pledged other than as described in Schedules "A" through "F"? _____
Are you endorser, co-maker, or guarantor on any other debts not listed on this statement?	\$ (fill-in amount above)	Are you a defendant in any lawsuits or legal actions? _____. If yes, then please describe on a separate sheet.
Legal claims, leases, contracts, other debts	\$ (fill-in amount above)	Have you ever been declared bankrupt? _____. If yes, then please describe on a separate sheet.

(Complete Schedules And Sign)

Schedule A – Cash on Hand

Institution	Description	In Name of	Are These Pledged?	Value

Schedule B – U.S. Government & Marketable and Non-Marketable Securities

Number of shares or face value (Bonds)	Description	In Name of	Are These Pledged?	Source Of Value	Market Value

Schedule C – Partial Interests In Real-Estate Equities

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Monthly Mortgage Payment	Mortgage Balance

Schedule D – Real-Estate Owned

Address & Type Of Property	Title In Name Of	Date Acquired	Cost	Market Value	Monthly Mortgage Payment	Mortgage Balance

Schedule E – Life Insurance

Name Of Insurance Company	Owners Of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

Schedule F – Banks Or Finance Companies Where Credit Has Been Obtained

Name & Address Of Lender	Credit In The Name Of	Secured Or Unsecured?	Original Date	High Credit	Current Balance

The undersigned: (i) certify(ies) that the information provided in this application is true and correct as of the date set forth next to the signature(s) below on this application; (ii) Authorizes New England Federal Credit Union to order consumer credit bureau reports without notice to the undersigned and verify credit information with other parties, including past and present mortgages and landlord references, during anytime the undersigned owes New England Federal Credit Union any amount under any promissory note, mortgage, guaranty, credit card, or any other credit facility. (iii) acknowledge(s) and understand(s) that any intentional or negligent misrepresentation(s) of the information contained in this application may result in civil liability and/or criminal penalties, including, but not limited to, fine, imprisonment, or both under the provisions of Title 18, United States Code, Section 1001, et seq. and liability for monetary damages to New England Federal Credit Union, its agents, successors and assigns, insurers, and any other person who may suffer any loss due to the reliance upon any misrepresentation which the undersigned has/have made on this application.

Signature (Individual) _____ Date _____

Signature (Other Party) _____ Date _____