

## **PERSONAL FINANCIAL STATEMENT**

Existing Member #:

You may apply for an extension of credit individually or jointly with another applicant. This statement and any applicable supporting schedules may be completed jointly by co-applicants if their assets and liabilities can be meaningfully and fairly presented on a combined basis, otherwise separate statements and schedules must be provided. If you are applying for an unsecured individual loan, you do not need to complete any information concerning a co-applicant unless another person will be permitted to use the account or you wish the co-applicant's or other person's income to be relied upon as the basis for repayment. For the purpose of obtaining credit from time to time with SFCU, the following statement and information are furnished as a complete, true, and accurate statement of the financial condition of the undersigned. All amounts are rounded to the nearest \$100.

APPLICANT			CO-APPLICANT					
Full Name	Full Name							
Street Address (cannot be a P.O. box)			Street Address (cannot be a P.O. box)					
City/State/Zip			City/State/Zip					
County			County					
Since Own		Rent\$	Since	Own		Rent\$		
Previous Address (if less than 5 years at present)	I		Previous Address (if less than 5 years	at present)		1		
City/State/Zip			City/State/Zip					
Since Owned		Rented \$\$	Since	Owned	]	Rented \$		
Social Security #	Date of Bir	th	Social Security #		Date of Bi	rth		
Phone: Residence	Work		Phone: Residence		Work			
Employer			Employer					
Address			Address					
Position/Title		Since	Position/Title Since					
Previous Employer			Previous Employer			1		
Position/Title		How Long	Position/Title			How Long		
Dependents (include self)			Dependents (include self)			I		
Marital Status *		ou a U.S. Citizen?	Marital Status *	] Separated		u a U.S. Citizen? ′es		
* Do not provide this information if your applica	ation is for		redit			-		

ASSETS		LIABILITIES				
Cash (Schedule 1)	\$	Short Term Notes Due Financial Insts. (Schedule 7)	\$			
Retirement Accounts, include IRA Accts. (Schedule 1)	\$	Short Term Notes Due to Others (Schedule 7)	\$			
Securities (Schedule 2)	\$	Credit Accounts and Bills Due (Schedule 8)	s			
Life Insurance Cash Value (Schedule 3)	\$	Insurance Loans (Schedule 3)	\$			
Mortgages and Contracts Held by You (Schedule 4)	\$	Installment Loans and Contracts (Schedule 7)	\$			
Homestead (Schedule 5)	\$	Mortgages on Home (Schedule 5)	\$			
Other Real Estate (Schedule 5)	\$	Mortgages on Other Real Estate (Schedule 5)	\$			
Profit Sharing & Pension (Schedule 6)	\$	Other Liabilities (Describe)	\$			
Automobile (Describe)	\$		\$			
	\$		\$			
Personal Property	\$		\$			
Other Assets (Describe)	\$		\$			
	\$	Total \$				
Total \$		(Total Assets Less Total Liabilities) Net Worth \$				

Please contact your banker if you need assistance with completing these schedules. Round all amounts to the nearest \$100.

* ANNUAL INCOME	APPLICANT	CO-APPLICANT	PLEASE ANSWER EACH QUESTION (Yes / No)	APP.	CO-APP
Salary	\$	\$	Are you a Co-Maker, Endorser or Guarantor of		
Bonuses/Commissions	\$	\$	any other person's debt?		
Dividends/Interest	\$	\$	Are you a defendant in any suit or legal action?		
Net Real Estate Income	\$	\$			
* Income from alimony, child support, or maintenance payments need not be entered unless you want it considered as a base for repayment.	\$	\$	Have you ever gone through bankruptcy or had a judgment against you?		
Other (List)	\$	\$	Have you made a will?		
Total \$					

### SCHEDULE 1 / CASH, SAVINGS, CERTIFICATES AND IRA ACCOUNTS

Name of Bank or Financial Institution	Type of Account	Joint	Indiv.	Acct. Balance
				\$
				\$
				\$
				\$
				\$
				\$
				\$

#### SCHEDULE 2 / SECURITIES OWNED

Par Value or No. of Shares	Description	Registered in Name(s) of	Listed or Unlisted	Current Market Value	
				\$	
				\$	
				\$	
				\$	
				\$	
Total \$					

#### SCHEDULE 3 / LIFE INSURANCE

Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans
			\$	\$	
			\$	\$	
			\$	\$	

#### SCHEDULE 4 / RECEIVABLES DUE TO ME ON MORTGAGES AND CONTRACTS I OWN

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity		Repayment Terms	Balance Due
				\$	per	\$
				\$	per	\$
				\$	per	\$
Total \$						

# SCHEDULE 5 / REAL ESTATE OWNED Please print this page again for additional Real Estate Owned.

Property Address (enter S if sold, PS if pending sale or R if rental being held for income)	Type*	Current Market Value	Mortgage Balance	Lender	Year Acquired	Mortgage Payments (per month)	Percent Owned	Interest Rate	Gross Rental Income (per month)
		\$	\$			\$	%	%	\$
		\$	\$			\$	%	%	\$
		\$	\$			\$	%	%	\$
		\$	\$			\$	%	%	\$
		\$	\$			\$	%	%	\$
		\$	\$			\$	%	%	\$
т	otals \$								

\*Enter SFR if single family residence, CRE if commercial real estate, C if condo, D if duplex, T if Triplex, 4+ if four or more units or PUD if planned unit development.

#### SCHEDULE 6 / PROFIT SHARING AND PENSION

Account Holder	Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
			\$	\$	
			\$	\$	
			\$	\$	
	•	Total \$			

#### SCHEDULE 7 / INSTALLMENTS, CREDIT LINES AND NOTES

Name of Creditor	Collateral	Date of Maturity	Repayment Terms	Balance Due
			\$ per	\$
			\$ per	\$
			\$ per	\$
			\$ per	\$
			Total \$	

#### SCHEDULE 8 / CREDIT ACCOUNTS, BILLS DUE, ALIMONY/CHILD SUPPORT, DAYCARE, ETC.

Name of Company	Repay	/ment Terms	Balance Due
	\$	per	\$
		Total \$	

You certify that the information provided in this statement is true and correct. So long as you owe any sums to SFCU, you agree to give SFCU prompt written notice of any material change in your financial condition and, upon request, you agree to provide SFCU with an updated personal financial statement. SFCU is authorized to retain this personal financial statement whether or not credit is approved and is further authorized to verify your credit and employment history or any other information in this statement. This application does not obligate SFCU to make any loan even if you meet the normal standards SFCU considers in determining whether to approve or deny the application. SFCU is Stanford Federal Credit Union.