

Personal Financial Statement

Please complete this form for: (1) each proprietor, or (2) each partner who owns 20% or more interest, or (3) each stockholder owning 20% or more of voting stock, or (4) any person or entity providing a guaranty on the loan.

APPLICANT INFORMATION

You may apply for credit or offer to guaranty a loan in your name without your spouse or any other persons, regardless of your marital status.

Business Name:	% Ownership:	
Individual Name:	Date of Birth:	
Member Number (if applicable):	Social Security Number:	
Driver's License Number:	Phone Number:	
Email Address:		
Address:		
City:	State:	Zip:
Employer:	Years Employed:	
Title:	Work Phone Number:	
Marital Status: <input type="radio"/> Married <input type="radio"/> Separated <input type="radio"/> Unmarried (single, divorced, widowed)		
Requesting Credit: <input type="radio"/> Separately <input type="radio"/> Jointly with Spouse		

PERSONAL BALANCE SHEET

Only individually owned assets or assets held as community property should be included on the Personal Balance Sheet.

Financial Condition as of (date):			
ASSETS		LIABILITIES	
Cash in SCCCUC	\$	Notes & Accounts Payable	\$
Cash in Other Financial Institutions	\$	Unpaid Income Tax	\$
Stocks & Bonds (Schedule A)	\$	Real Estate Mortgages (Schedule B)	\$
Accounts & Notes Receivable	\$	Vehicle Loan(s)	\$
Real Estate (Schedule B)	\$	Vehicle Loan(s)	\$
Vehicles	\$	Credit Card(s)	\$
Other Investments (Schedule A)	\$	Credit Card(s)	\$
Other Assets (Please Itemize)	\$	Credit Card(s)	\$
Total Assets	\$	Total Liabilities	\$
Net Worth (Total Assets - Total Liabilities) = \$			

Personal Financial Statement

SCHEDULE A: SECURITIES – Stocks, bonds, and other investments

# Shares	Description	In Name Of	Cost	Cash or Market Value

SCHEDULE B: REAL ESTATE

Property/Address	% Owner	Cost	Market Value	Current Mortgage Holder	Mortgage Balance	Monthly Rent

MONTHLY INCOME & EXPENSES

Alimony, child support or maintenance need not be shown if you do want us to consider it.

INCOME		EXPENSES	
Salary	\$	Mortgage or Rent	\$
Dividends & Interest	\$	Property Tax	\$
Rental Income	\$	Income Tax	\$
Other Income	\$	Insurance	\$
Other Income	\$	Alimony, Child Support, Maintenance	\$
Other Income	\$	Credit Card(s)	\$
Total Income	\$	Auto Loan(s)	\$
		Other	\$
		Total Expenses	\$

I understand that Santa Cruz Community Credit Union (SCCCU) is relying on this information in this financial statement in deciding to give or continue the extension of credit I have requested or received. I promise that this is a true statement of my financial condition as of the date of valuations and you may rely on it being true and correct until I otherwise notify you in writing. SCCCUC is authorized to make all inquiries deemed necessary to verify the accuracy of the information contained herein, to determine the credit worthiness of the undersigned and gather credit information of the undersigned. I authorize SCCCUC to answer questions about the credit experience with the undersigned.

I have read, understand, and agree to make these representations and warranties.

Signature _____

Date _____