

PERSONAL FINANCIAL STATEMENT

As of _____

Complete this form for: (1) each proprietor, or (2) each limited partner who owns 20% or more interest and each general partner, or (3) each stockholder owning 20% or more of voting stock and each corporate officer and director, or (4) any other person or entity providing a guaranty on the loan.

Name	Business Phone ()
	Residence Phone ()
Residence Address	Email Address
City, State & Zip Code	Type of Business
Business Name of Applicant/Borrower	

*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

ASSETS	(Omit cents)	LIABILITIES	(Omit cents)
Cash on Hand & in Banks	\$	Accounts Payable	\$
Savings Accounts	\$	Notes payable to Banks & Others	
IRA or Other Retirement Accounts	\$	(Describe in Section 2)	\$
Accounts & Notes Receivable	\$	Installment Account (Auto)	
Life Ins - Cash Surrender Value Only		Mo. Payment \$ _____	\$
(Complete Section 8)	\$	Installment Account (Other)	
Stocks and Bonds		Mo. Payment \$ _____	\$
(Describe in Section 3)	\$	Loan on Life Insurance	\$
Real Estate		Mortgages on Real Estate	
(Describe in Section 4)	\$	(Describe in Section 4)	\$
Automobile - Present Value	\$	Unpaid Taxes	
Other Personal Property		(Describe in Section 6)	\$
(Describe in Section 5)	\$	Other Liabilities	
Other Assets		(Describe in Section 7)	\$
(Describe in Section 5)	\$	Total Liabilities	\$
Total Assets	\$	Net Worth	
		Total	\$

Section 1. Source of Income	Contingent Liabilities
Salary	As Endorser or Co-Maker
Net Investment Income	Legal Claims and Judgements
Real Estate Income	Provision for Federal Income Tax
Other Income (Describe below)*	Other Special Debt

Description of Other Income in Section 1.

Section 2. Notes Payable to Bank and Others (Use attachments if necessary. Each attachment must be identified as part of this statement and signed.)

Name and Address of Note Holder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc.)	How Secured or Endorsed Type of Coll.

Section 3. Stocks and bonds. (Use attachments if necessary, each attachment must be identified as part of this stmt. and signed.)					
Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quot./Exch.	Total Value

Section 4. Real Estate Owned (List each parcel separately. Use attachments if necessary. Each attachment must be identified as part of this statement and signed.)			
	Property A	Property B	Property C
Type of Property (Res., Investmt.)			
Address of Property			
Name of Property Owner			
% of Ownership			
Date Purchased			
Original Cost			
Present Market Value			
Gross Annual Rental Income			
Name of Lender			
Loan Number			
Loan Balance			
Amount of Pymt. per Mo. (Annual)			

Section 5. Other Personal Property and Other Assets (Describe, and if any is pledged as security, state name and address of lien holder, amount of lien, terms of payment, and if delinquent, describe delinquency.)

Section 6. Unpaid Taxes (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

Section 7. Other Liabilities (Describe in detail)

Section 8. Insurance Held (Give face amount and cash surrender value of policies - name of insurance and beneficiaries.)

I authorize the Credit Union or its agent, East Coast Business Lenders, LLC to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I also authorize the Credit Union or its agent, East Coast Business Lenders, LLC to pull a personal credit bureau report. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I understand FALSE statements on an SBA loan application may result in forfeiture of benefits, a fine up to \$10,000, or imprisonment for not more than five years, or both, under 18 U.S.C. 1001. FALSE statements on a conventional loan application may result in fines and imprisonment under relevant Federal and State laws.

Signature	Date	Social Security Number
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Signature	Date	Social Security Number
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