



PERSONAL FINANCIAL STATEMENT

DATED AS OF:

I may apply for a credit extension, loan or other financial accommodation alone or together with someone else, ("co-applicant"). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this required statement and any supporting schedules jointly. Otherwise, separate forms and schedules are required.

<u>APPLICANT</u>			
Name	_____	Social Security #	_____
Address	_____	City, State, Zip	_____
Telephone number	_____	Date of birth	_____
Present employer	_____	Position	_____
Year at this job	_____	US Citizen:	Yes_____ NO _____
Address	_____	City, State, Zip	_____
Business phone	_____	E-mail address	_____
Cell phone	_____	Loan purpose	_____
<u>CO-APPLICANT</u>			
Name	_____	Social Security #	_____
Address	_____	City, State, Zip	_____
Telephone number	_____	Date of birth	_____
Present employer	_____	Position	_____
Year at this job	_____	US Citizen:	Yes_____ NO _____
Address	_____	City, State, Zip	_____
Business phone	_____	E-mail address	_____
Cell phone	_____	Loan purpose	_____

ASSETS		AMOUNT	LIABILITIES		AMOUNT
Cash in this bank:	Checking		Loans payable to banks and others (Schedule 7)		
	Savings				
Cash in other banks:			Credit cards		
			Other charge accounts		
Due from friends, relatives & others (Schedule 1)					
Mortgage & contract for deeds owned (Schedule 2)			Income taxes payable		
Securities owned / Retirement accts (Schedule 3)			Other taxes payable		
Cash surrender value of life insur. (Schedule 4)			Loans on life insurance (Schedule 4)		
Personal Residence (Schedule 5)			Mortgages on Personal Residence (Schedule 6)		
Other real estate owned (Schedule 5)			Mortgages other real estate (Schedule 6)		
Vehicles (year, make, model)			Other:		
Other:					
Personal property					
Other assets			TOTAL LIABILITIES		\$
			NET WORTH		\$
TOTAL ASSETS		\$	TOTAL		\$

Annual Income	Applicant	Co-applicant	Contingent liabilities	Amount
Salary			As co-maker	
Commissions & Bonuses			As guarantor	
Dividends			Lawsuits	
Interest			For taxes	
Rentals			Other (detail)	
Alimony, child support or maintenance				
you need not show this unless you wish us to consider it				
Other				
TOTAL INCOME	\$	\$	TOTAL	\$

SCHEDULE 1 DUE FROM FRIENDS, RELATIVES & OTHERS

Name of debtor	Owed to	Collateral	How payable	Maturity date	Unpaid balance
TOTAL					\$

SCHEDULE 2 MORTGAGE AND CONTRACTS FOR DEED OWNED

Name of debtor	Type of property	1st or 2nd lien	Owed to	How payable	Unpaid balance
TOTAL					\$

SCHEDULE 3 SECURITIES OWNED / RETIREMENT ACCOUNTS

Description	In whose name registered	Number of shares	Listed / Unlisted	Cost	Current Value
TOTAL					\$

SCHEDULE 4 LIFE INSURANCE

Insured	Insurance Company	Beneficiary	Face Value	Cash Value	Loans
TOTAL				\$	\$

SCHEDULE 5 REAL ESTATE

Address & type	Title in name of	Monthly income	Cost / date acquired	Current Value	Amount of ins.
Personal Residence					
Other Real Estate					
		\$	TOTAL	\$	

SCHEDULE 6 MORTGAGES OR LIENS ON REAL ESTATE

Address & type	To whom payable	Monthly payment	Interest rate	Maturity date	Unpaid balance
Personal Residence 1st Mtg.					
Other Real Estate 2nd Mtg.					
TOTAL					\$

SCHEDULE 7 LOANS PAYABLE TO BANKS & OTHERS

To whom payable	Secured by	Monthly payment	Interest rate	Maturity date	Unpaid balance
TOTAL					\$

1 Have you ever gone through bankruptcy or had a judgment against you?

Explain:

2 Are any assets pledged or debts secured except as shown?

Explain:

3 Have you completed a will or estate planning?

4 Number of dependents (excluding self)

5 Marital status:

(answer only if this financial statement is provided in connection with a request for secured credit or applicant is seeking a joint account with spouse).

6 Are any of the assets in the name of a trust? _____ If so, please provide details and a copy of the trust agreement _____

Applicant	Co-applicant

The foregoing statement is submitted for the purpose of obtaining credit. It is true and correct in every detail and fairly shows the financial condition of the applicant(s) as of this date. The applicant(s) will promptly notify the bank of any subsequent substantial change in such financial condition. The bank is authorized to retain this financial statement, whether or not the credit requested is approved, and to check the credit of the applicant(s) or any other information contained herein.

Financial Statement Dated As Of : _____

THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.

_____ Date

(if you are requesting the financial accommodation jointly)

_____ Date

To sign the document, please download to your desktop. To send to Unison Bank, please contact us for a secure link. Please do not send by unsecured email.

Schedule "A"
Company Investments

Name & Type of Entity	Total Assets	Total Liabilities	Net Worth	Percentage Ownership	Current Value of Ownership %	Amt. of Personal Contingent Liability	Monthly Payment
			\$		\$		
			\$		\$		
			\$		\$		
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			\$		\$		
			\$		\$		
				Total	\$	\$	\$