



PERSONAL FINANCIAL STATEMENT

Unison Bank
Updated: 7/13/2021

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.

***NOTE:** Please fill out the following schedules. These will automatically fill out the balance sheet on page 5.

APPLICANT

First & Last Name _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

SSN # _____ Date of Birth: _____

US Citizen: ☐ Yes ☐ No

Current Employer: _____

Employer's Address: _____

City: _____ State: _____ Zip Code: _____

Business Phone: _____ Business Email: _____

Position: _____ Year Started: _____

Loan Purpose: _____

CO-APPLICANT

First & Last Name _____

Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Email: _____

SSN # _____ Date of Birth: _____

US Citizen: ☐ Yes ☐ No

Current Employer: _____

Employer's Address: _____

City: _____ State: _____ Zip Code: _____

Business Phone: _____ Business Email: _____

Position: _____ Year Started: _____

Loan Purpose: _____

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SCHEDULE 1 DUE FROM FRIENDS, RELATIVES & OTHERS

Name of Debtor	Owed To	Collateral	How Payable	Maturity Date	Unpaid Balance
Total:					\$

SCHEDULE 2 MORTGAGE & CONTRACTS FOR DEED OWNED

Name of Debtor	Type of Property	1 st or 2 nd Lien	Owed To	How Payable	Unpaid Balance
Total:					\$

SCHEDULE 3 SECURITIES OWNED / RETIREMENT ACCOUNTS

Description	Registered Name	# of Shares	Listed / Unlisted	Cost	Current Value
Total:					\$

SCHEDULE 4 LIFE INSURANCE

Insured	Insurance Company	Beneficiary	Policy Amount	Cash Value	Loans
Total:				\$	\$

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SCHEDULE 5 REAL ESTATE

Address & Type	Title in Name of	Monthly Income	Cost / Date Acquired	Current Value	Amount of Ins.
Primary Residence					
Other Real Estate					
Total:		\$	Total:		\$

SCHEDULE 6 MORTGAGES OR LIENS ON REAL ESTATE

Address & Type	To Whom Payable	Monthly Payment	Interest Rate	Maturity Date	Unpaid Balance
Primary Residence					
Other Real Estate					
Total:					\$

SCHEDULE 7 LOANS PAYABLE TO BANKS & OTHERS

To Whom Payable	Secured By	Monthly Payment	Interest Rate	Maturity Date	Unpaid Balance
Total:					\$



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SCHEDULE A

COMPANY INVESTMENTS

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

Assets	Amount	Liabilities	Amount
Cash in this bank: Checking		Credit cards	
Savings		Other charge accounts	
Cash in other banks:		Income taxes payable	
		Other taxes payable	
Due from friends, relatives & others (sched. 1)	\$		
Mortgage & contract for deeds owned (sched. 2)	\$	Loans on life insurance (sched. 4)	\$
Securities owned / retirement accts. (sched. 3)	\$	Mortgages on prim. residence (sched. 6)	\$
Cash surrender value of life ins. (sched. 4)	\$	Mortgages other real estate (sched. 6)	\$
Personal residence (sched. 5)	\$	Loans payable to banks/others (sched. 7)	\$
Other real estate owned (sched. 5)	\$		
Vehicles (year, make, model)			
Other		Other liabilities	
Personal property			
		Total Liabilities:	\$
Total Assets:	\$	Net Worth:	\$

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:	\$



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Have you ever gone through bankruptcy or had a judgment against you? ☐ Applicant ☐ Co-applicant

Explain: _____

Are any assets pledged or debts secured except as shown? ☐ Applicant ☐ Co-applicant

Explain: _____

Have you completed a will or estate planning? ☐ Applicant ☐ Co-applicant

Number of dependents (excluding self): _____

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.)

If any assets are held in the name of a trust, you must provide details and a copy of the trust agreement.

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.

The undersigned certify that the information contained on this form has been carefully reviewed and that it is true and correct in all respects.

Applicant Signature

Date

Co-applicant Signature

Date