



PERSONAL FINANCIAL STATEMENT

Please Check Appropriate Circle

- ☐ Individual - relying on your own income and assets, and not the income and assets of spouse or another person. Do not provide information about spouse or another person.
- ☐ Joint - We intend to apply for joint credit relying upon jointly owned assets, and income and assets of spouse or another person. Include information about income, assets and liabilities of spouse or other person.

Name: _____ Social Security No: _____
 Address: _____ Business Phone: _____
 City, State & Zip Code: _____ Residence Phone: _____

Name: _____ Social Security No: _____
 Address: _____ Business Phone: _____
 City, State & Zip Code: _____ Residence Phone: _____

ASSETS		(Omit Cents)	LIABILITIES		(Omit Cents)
Cash & Checking Accounts	\$	_____	Account Payable (Including Credit Cards)	\$	_____
Savings Accounts & CD's	\$	_____	Notes Payable to Banks (Describe in Section 2)	\$	_____
IRA or Other Retirement Accounts	\$	_____	Installment Account (Auto)	\$	_____
Accounts & Notes Receivable	\$	_____	Mo. Payments \$	_____	
Life Insurance-Cash Surrender Value Only (Complete Section 7)	\$	_____	Installment Account (Other)	\$	_____
Stocks & Bonds (Describe in Section 3)	\$	_____	Mo. Payments \$	_____	
Real Estate (Describe in Section 4)	\$	_____	Installment Account (Other)	\$	_____
Closely Held Companies (Net Worth)	\$	_____	Mo. Payments \$	_____	
Other Personal Property – Include Automobile (Describe in Section 5)	\$	_____	Mortgages on Real Estate (Describe in Section 4)	\$	_____
Other Assets (Describe in Section 5)	\$	_____	Unpaid Taxes (Describe in Section 6)	\$	_____
TOTAL	\$	_____	Other Liabilities (Describe in Section 8)	\$	_____
			Total Liabilities	\$	_____
			Net Worth	\$	_____
			TOTAL	\$	_____

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

Description of Other Income Section 1.

*You do not have to include information about income from alimony, child support or separate maintenance payments unless you want us to consider this income in connection with this application for credit.

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

CREDITOR	ORIGINAL DATE	ORIGINAL AMOUNT	PRESENT BALANCE	INTEREST RATE	MONTHLY PAYMENT	MATURITY DATE	COLLATERAL/ SECURITY
Grand Totals							

Section 3. Stocks and Bonds (Use attachments if necessary. Each attachment must be identified as a part of this statement and signed)

Number of	Indicate:			Pledged	
Shares, Face Value (Bonds), or % of Ownership	Agency or name of company issuing security or name of partnership	Stock Ticker Symbol, If Applicable	Market Value	Yes (<input type="checkbox"/>)	No (<input type="checkbox"/>)

Section 4. Real Estate Owned (List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed).

Property	Property A	Property B	Property C
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder(s)			
Mortgage Account Number(s)			
Mortgage Balance			
Amount of Payment per Month (PITI and Condo/TH Fee)			
Gross Rental Income, If Any			

Section 5. Other Personal Property and Others 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. Life Insurance Held. (Give face amount and cash surrender value of policies- name of insurance company and beneficiaries).

Section 8. Other Liabilities (Describe in detail as to type, to whom payable, terms, etc.)

Section 9. Other Information

[illegible]

I/We authorize Northwest Federal Credit Union, or its designee, to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I/We certify the above and the statements contained in the attachments are true and accurate of the stated date (s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I/We understand FALSE statements may result forfeiture and possible prosecution by the U.S. Attorney General. (Ref. 18 U.S. C. 1001).

Signature:	Date:
Signature:	Date: