



# Personal Financial Statement

## Section A. Primary Information

Full Name		Birth Date	No. of Dependents
Home Address	City, State, ZIP		Length of Residency _____ yrs _____ mo
Driver's License Number/State		Issue Date	Exp. Date
Other Identification	SSN	Home Phone	Email
Employer		Position/Occupation	Length of Employment _____ yrs _____ mo
Employer's Address (Street, City, State, ZIP)		Business Type	Business Phone

## Section B. Joint Applicant/Other Individual

Full Name		Birth Date	No. of Dependents
Home Address	City, State, ZIP		Length of Residency _____ yrs _____ mo
Driver's License Number/State		Issue Date	Exp. Date
Other Identification	SSN	Home Phone	Email
Employer		Position/Occupation	Length of Employment _____ yrs _____ mo
Employer's Address		Business Type	Business Phone

**For all married applicants:**

Check this box if applying for Sole and Separate credit:  Otherwise, I/we intend to apply for Community Property credit.

## Section C. Income

You need not reveal income from alimony, child support or maintenance payments unless you want the Credit Union to consider it.

Description	Primary Applicant		Description	Joint/Other Applicant	
	Annual Gross Amount	Annual Net Pay		Annual Gross Amount	Annual Net Pay
Business or Salary Income			Business or Salary Income		
Bonus or Commissions			Bonus or Commissions		
Dividends			Dividends		
Real Estate Income			Real Estate Income		
Other (Specify)			Other (Specify)		

## Section D. Financial Information

Assets	Amount	Liabilities	Payment (Monthly)	Amount Owed
Cash (OneAZ Credit Union)		Unsecured Loans (One AZ Credit Union)		
Cash (Other Institutions)		Unsecured Loans (Other Institutions)		
Certificates of Deposit		Loans on Stocks/Bonds		
Retirement Accounts (IRA, Keogh, etc.)		Loans on Life Insurance		
Accounts/Notes Receivable, See Schedule I		Auto Loans		
Stocks & Bonds, see Schedule II		Charge Accounts		
Real Estate Owned, see Schedule III		Rent/Lease Payment(s)		
Cash Value Life Insurance, see Schedule IV		Real Estate Mortgage, see Schedule III		
Vehicles		Unpaid Income Taxes		
Other Assets (Itemize)		Other Unpaid Taxes		
		Alimony, Child Support, Maintenance		
		Medical Bills Due		
		Other Debts (Itemize)		
<b>Total Assets</b>		<b>Total Liabilities</b>		
		<b>Net Worth</b>		

# Personal Financial Statement

## Section E. Bank Information

Type of Account	Financial Institution Name
Type of Account	Financial Institution Name
Type of Account	Financial Institution Name

## Schedule I. Accounts & Notes Receivable

Name	Date	Payments	Frequency	Maturity	Collateral	Original Balance	Current Balance
Subtotal							

## Schedule II. Stocks & Bonds Owned

No. Shares of Face Value (Bonds)	Description & Company	Registered in Name of	Market Value	Loans
Subtotal				

## Schedule III. Real Estate Owned

Description of Property & Improvements	Title in Name of	Date Purchased	Lender	Price Paid	Present Market Value	Mortgage Balance	Mortgage Payment
Subtotal							

## Schedule IV. Life Insurance Carried

Policy Amount	Company Name/Phone Number	Carried in Name of	Beneficiary	Cash Surrender Value	Loans
Subtotal					

## Banks/Finance Companies Where Credit Has Been Obtained

Name	Address	Date	Credit in Name of	Collateral	High Credit	Purpose
Subtotal						

## Insurance

Auto Insurance Company	Agent Name & Address	Amount
Homeowner's Insurance Company	Agent Name & Address	Amount

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## Contingent Liabilities

As Accommodation Endorser/Co-maker, Where	As Guarantor, Where
Are you liable for Alimony, Child Support or Maintenance Payments? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, \$ _____ per _____ for _____ months.	
Do you have Leasing Obligations? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, \$ _____ per _____ for _____ months.	
Leasing Obligations (Describe)	

## Declarations

Are you involved in any pending claims or lawsuits?	<input type="checkbox"/> Yes <input type="checkbox"/> No
State and Federal Income Tax returns have not been filed for the previous year?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any State, Federal, or Property Taxes past due, being audited, or contested?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have there been any bankruptcies, judgments, repossessions or compromised debt (personal or business) in the last 10 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any assets held in a Trust or Family Limited Partnership?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is a Trust or other entity the Beneficiary of any pension, retirement or insurance plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Any liability for guaranty, indemnity or other contingencies?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Any loan requests pending at other Financial Institutions?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any of the listed assets held as sole and separate property?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you obtained credit under any other names or with other individuals?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you currently or have you been subject of a delinquent tax lien or payment arrangement with the IRS or state tax authority?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever been convicted of a felony?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you answered, "Yes," to any of the above questions, please explain below or attach an additional page.	

## Joint Credit Acknowledgment

By signing below, Primary and Joint (if applicable) acknowledge their intent to apply for joint credit.

Primary Signature	Joint Signature (if applicable)
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## Terms & Conditions

The information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledge and understand you are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. Each of the undersigned represents, warrants, and certifies the information provided here is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) any of the information contained in this statement or (2) in any financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform his/her (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as continuing statement and substantially correct. If the undersigned fail to notify you as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, you may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, immediately due and payable. You are authorized to make all inquiries you deem necessary to verify the accuracy or the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorize any person, consumer reporting agency, or entity to give you any information it may have on the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned. As long as any obligation or guarantee of the undersigned to you is outstanding, the undersigned shall supply annually an updated financial statement. This personal financial statement and any other financial or other information the undersigned give you shall be your property.

## Acceptance

Primary Signature	Date
Joint Signature (if applicable)	Date