

## PERSONAL FINANCIAL STATEMENT

Submitted to: Tongass Federal Credit Union

Date: \_\_\_\_\_

Section 1: Individual Information				Section 2: Other Party Information			
Name		Birth Date		Name		Birth Date	
SSN:		Phone		SSN:		Phone	
Residence Address		Mailing Address		Residence Address		Mailing Address	
City		State	Zip	City		State	Zip
Rent___ Own___ Payment \$		How Long		Rent___ Own___ Payment \$		How Long	
Business Information				Business Information			
Name of Business				Name of Business			
Address				Address			
City		State	Zip	City		State	Zip
Phone		How long?	Years in profession?	Phone		How long?	Years in profession
Position/Occupation		Gross Mo. Salary		Position/Occupation		Gross Mo. Salary	
Previous Employer		How long?		Previous Employer		How long?	
Other Income				Other Income			
Alimony, child support or separate maintenance income need no be revealed, unless you wish to have it considered as a basis for repaying this obligation.							
Other Income \$		Source		Other Income \$		Source	

Assets (use positive #s)		Liabilities	
Cash in Credit Unions or Banks (Schedule A):	\$	Loans Owed to TFCU	\$
Stocks and Bonds (Schedule A):	\$	Credit Card(s)	\$
Retirement (Schedule A):	\$		\$
Vehicle Year:            Make:	\$	Vehicle Loan	\$
Vehicle Year:            Make:	\$	Vehicle Loan	\$
Home (Schedule B):	\$	Mortgage	\$
Other Real Estate (Schedule B):	\$	Other Real Estate Loans	\$
Boat	\$	Boat Loan	\$
Cash Value Life Insurance:	\$	Debts Not Yet Listed (Schedule C)	\$
Other Assets:	\$		\$
	\$		\$
	\$		\$
<b>Total Assets</b>	\$	<b>Total Loan Balances</b>	\$
<b>(Total Assets – Total Loan Balances) = Net Worth</b>			\$

## PERSONAL FINANCIAL STATEMENT (Cont.)

### DEPOSITORY & BROKERAGE INFORMATION (Schedule A)

Credit Union/Bank/Brokerage	Account #	Current Balance	Average Balance

### SCHEDULE OF REAL ESTATE OWNED (Schedule B)

Type/Address	Market Value	Current Balance	Mortgage Payment	Rental Income

### LOANS OWING BANKS, FINANCE COMPANIES, CREDIT CARDS, ETC. (Schedule C)

Owing To	Monthly Payment	Present Balance	Secured By

Answer the following questions: If a "YES" answer is given to a question, explain on an attached sheet:	Individual		Joint	
	Yes	No	Yes	No
Do you have any other pending loan applications at any other financial institutions?				
Have you any outstanding judgments?				
Are you party to a lawsuit?				
Are you other than a U.S. Citizen or Permanent Resident Alien?				
Other Obligations (e.g. liability for child support, alimony or separate maintenance, etc.)				
Are you a co-maker, co-signer or guarantor on any loan?				

I (we) hereby declare that the above credit representations are true and complete to the best of my (our) knowledge and belief and are submitted for the purpose of procuring credit. This personal financial statement becomes the property of the credit union. This credit union is hereby authorized to obtain such information as may be required to corroborate the foregoing statements. I agree to pay fees charged for credit reports, appraisal and title search even if the loan is not approved. **If more than one party signs below, we intend to apply for joint credit.**

Date Signed: \_\_\_\_\_

Signature (Individual) \_\_\_\_\_

Date Signed: \_\_\_\_\_

Signature (Joint) \_\_\_\_\_