

Financial Statement

Borrower

Name: _____

Current Mailing Address: _____

City: _____

State: _____

Zip: _____

Telephone Day: _____

Telephone Evening: _____

Social Security Number: ____ - ____ - ____

of Dependents: ____

Ages of Dependents: ____ ____ ____ ____

Are you currently employed? _____

Length of Employment (months): ____

Gross income: \$ _____

Paycheck deductions:

Medical Insurance: \$ _____

Life Insurance: \$ _____

Retirement: \$ _____

Profit Sharing: \$ _____

Other Deductions: \$ _____

Explain: _____

What is your pay cycle? _____

Monthly Net income? _____

Do you receive a monthly bonus? _____

Amount: \$ _____

Co-Borrower

Name: _____

Current Mailing Address: _____

City: _____

State: _____

Zip: _____

Telephone Day: _____

Telephone Evening: _____

Social Security Number: ____ - ____ - ____

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Explain: _____

What is your pay cycle? _____

Monthly Net income? _____

Do you receive a monthly bonus? _____

Amount: \$ _____

Do you receive overtime/commission? _____

Amount \$ _____

Is this amount earned:

Are you self employed? _____

If yes, date of last employment _____

Former Gross monthly Income: \$ _____

Total Severance Package Value:

\$ _____

Monthly Unemployment Pay:

\$ _____

Do you receive Child Support? _____

Total monthly Payments?

\$ _____

expiration date _____

Do you receive alimony? _____

Total monthly Payments?

\$ _____

expiration date: _____

Other Income:

Source: _____

For which year did you last file a tax return? _____

Gross Income: \$ _____

Interest Income \$ _____

Dividend Income: \$ _____

If you did not file a tax return last year explain why? _____

Total Checking Balance: \$ _____

Name and address of financial Institution:

Do you receive overtime/commission? _____

Amount \$ _____

Is this amount earned:

Are you self employed? _____

If yes, date of last employment _____

Former Gross monthly Income: \$ _____

Total Severance Package Value:

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Monthly Unemployment Pay:

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Interest Income \$ _____

Dividend Income: \$ _____

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Total Checking Balance: \$ _____

Name and address of financial Institution:

Account Number: _____

Total Savings Balance: \$ _____

Name and address of financial Institution:

Account Number: _____

Company Retirement Account:

\$ _____

Total 401k/IRA: \$ _____

Total Investments:

Stocks: \$ _____

Bonds: \$ _____

Other Securities: \$ _____

Other: \$ _____

Total other assets:

Cash value of Life Insurance?

\$ _____

Notes Payable to you?

\$ _____

Personal Property: \$ _____

Vehicles: \$ _____

Others: \$ _____

How many properties do you own? _____

For each property (attach a separate sheet for more than one)

Current Value: \$ _____

Monthly Rental: \$ _____

Debt on Property: \$ _____

Is the debt past due: _____

Monthly homeowners dues: \$ _____

Account Number: _____

Total Savings Balance: \$ _____

Name and address of financial Institution:

Account Number: _____

Company Retirement Account:

\$ _____

Total 401k/IRA: \$ _____

Total Investments:

Stocks: \$ _____

Bonds: \$ _____

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