

Personal Financial Statement

All owners with ownership interest of 20% or greater, please complete. Attach additional pages if necessary. List all amounts in dollars. Omit cents.
Financial Information (Owner #1)

Owner #1 Name _____ Annual Income \$ _____ Housing Expense \$ _____/mo.

Assets

Cash on Hand \$ _____
 Cash in Financial Institutions \$ _____
 Real Estate Owned (Schedule 1)
 Securities Owned \$ _____
 401(k)s and IRAs \$ _____
 Automobiles \$ _____
 Other \$ _____

Total Assets

\$ _____

Schedule 1 - Real Estate Owned (Owner #1)

Address and Type of Property (including Primary Residence)	Mortgage Holder	Mortgage Balance	Year Acquired	Present Market Value	Monthly Mortgage Payments
1. _____	_____	\$ _____	_____	\$ _____	\$ _____
2. _____	_____	\$ _____	_____	\$ _____	\$ _____
3. _____	_____	\$ _____	_____	\$ _____	\$ _____

Additional Information (Owner #1)

Are you a defendant in any legal actions, have judgments, tax levies or garnishments against you? Yes No If yes, explain on separate sheet:

Have you or any firm in which you were a major owner ever filed for bankruptcy or settled any debts for less than the amounts owed? Yes No If yes, explain on separate sheet.

Financial Information (Owner #2)

Owner #2 Name _____ Annual Income \$ _____ Housing Expense \$ _____/mo.

Assets

Cash on Hand \$ _____
 Cash in Financial Institutions \$ _____
 Real Estate Owned (Schedule 1)
 Securities Owned \$ _____
 401(k)s and IRAs \$ _____
 Automobiles \$ _____
 Other \$ _____

Total Assets

\$ _____

Schedule 1 - Real Estate Owned (Owner #2)

Address and Type of Property (including Primary Residence)	Mortgage Holder	Mortgage Balance	Year Acquired	Present Market Value	Monthly Mortgage Payments
1. _____	_____	\$ _____	_____	\$ _____	\$ _____
2. _____	_____	\$ _____	_____	\$ _____	\$ _____
3. _____	_____	\$ _____	_____	\$ _____	\$ _____

Additional Information (Owner #2)

Are you a defendant in any legal actions, have judgments, tax levies or garnishments against you? Yes No If yes, explain on separate sheet.

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Rate Fixed Amt. Appvd. Total Comit. Amt. _____

Description of Collateral/Comments _____

Collateral Business Assets Specific Equipment Real Estate/Home Equity Other
 Annual Fees \$ _____ Date _____

Initial Disbursement \$ _____ Method: Cashier's Check Wine Transfer Checking Account # _____