PERSONAL FINANCIAL STATEMENT AND LOAN APPLICATION

To: CITY OF SPRINGFIELD ☐ Joint Application ☐ Individual Application

NAME(S)	SOCIAL SECURITY NUMBER (LIST ALL)
STREET ADDRESS, CITY, STATE, ZIP	RESIDENCE PHONE NUMBER
BUSINESS NAME	BUSINESS PHONE NUMBER
BUSINESS ADDRESS	POSITION OR OCCUPATION

LOAN REQUEST $	PURPOSE OF LOAN
COLLATERAL	REPAYMENT PROGRAM

ASSETS		LIABILITIES	
Cash on hand & in banks (checking)		Notes Payable (fill in schedule F)	
CDs & Savings		Banks – secured	
U.S. Govt. Securities (fill in schedule B)		Banks – unsecured	
Listed securities (fill in schedule B)		Security Interest, Liens, Chattel Mortgages	
Unlisted securities (fill in schedule C)		Others	
Cash value life ins. (fill in schedule D)		Accounts and bills due	
Accounts and notes receivable (itemize)		Unpaid real estate taxes	
		Unpaid income taxes	
		Mortgages payable on real estate -fill in Schedule E	
Real estate owned (fill in schedule E)		Loans on life ins. policies	
Automobiles		Other debts – itemize	
Personal Property			
Investment in own business			
Other assets-itemize			
		Total Liabilities	
		Net Worth	
Total Assets		Total Liabilities and Net Worth	

SOURCE OF INCOME – Alimony, child support, or maintenance income need not be revealed if you do not wish it to be considered as a basis for repaying this obligation. Do not include income of co-applicant unless joint application or such income is to be considered as a basis of repayment.

	APPLICANT	CO-APPLICANT
Salary (Annual)		
Bonus and/or commissions		
Dividends and/or bond interest		
Real estate income (Net)		
Other income – itemize		
Total		

PERSONAL INFORMATION

Business or occupation _____

Partner or officer in any other venture? _____

Birthdate _____ No. Dependents _____ Ages _____

Do you have a will? _____ Name of executor _____

Do not answer the following question unless you are applying for joint credit or a secured loan or you reside in a Community Property State.

Married _____ Separated _____ Unmarried _____

CONTINGENT LIABILITIES (Individually or Jointly)

As endorser, comaker, or guarantor* _____

On leases or contracts* _____

_____

Are you liable for any unsatisfied judgments? _____

Other Contingent Liabilities* _____

_____

GENERAL INFORMATION

Are you defendant in any suits or legal actions? _____

_____

Personal bank accounts carried at _____

_____

Have you ever taken bankruptcy? _____ If yes, date: _____

Explain: _____

*REMARKS: Please use the following space for any comments or explanations you wish to make. (attach additional sheet if needed)

_____

_____

The undersigned hereby certifies that both sides hereof and the information inserted therein has been carefully read and is true, correct, and complete. I/We agree to notify the bank of any significant changes in my/our financial condition.

Date signed _____, 20____ Signature _____

Date signed _____, 20____ Signature _____

(Please complete schedules on reverse side)

IF ADDITIONAL SPACE IS NEEDED PLEASE ATTACH A SEPARATE SHEET.

(Schedule A) LIST OF BANKS AND FINANCE COMPANIES WHERE PAST CREDIT HAS BEEN OBTAINED

NAME	DATE OPENED	HIGH CREDIT	CURRENT BALANCE	COLLATERAL

(Schedule B) U.S. GOVERNMENT SECURITIES, LISTED STOCKS AND BONDS

AMT OR # OF SHARES	DESCRIPTION, INCLUDING MATURITIES	JOINT/INDIVIDUAL	MARKET VALUE
			TOTAL

(Schedule C) UNLISTED SECURITIES

AMT OR # OF SHARES	DESCRIPTION, INCLUDING MATURITIES	JOINT/INDIVIDUAL	MARKET VALUE
			TOTAL

(Schedule D) LIFE INSURANCE

INSURED	BENEFICIARY	NAME OF COMPANY	FACE AMOUNT	CASH VALUE	LOANS
		TOTAL			

(Schedule E) LAND AND BUILDINGS

DATE PURCHASED	COST	MARKET VALUE	MORTGAGE BAL	TITLE IN NAME OF	DESCRIPTION AND LOCATION	MORTGAGOR
TOTALS						

(Schedule F) NOTES AND ACCOUNTS PAYABLE

TO WHOM PAYABLE	DATE OF NOTE	ORIGINAL AMOUNT	BALANCE DUE	PYMT SCHEDULE	COLLATERAL

LOAN OFFICER COMMENTS AND DISPOSITION: