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To create a personal financial statement, complete the form for each applicant and only list desired assets. Include name, business phone, address, residence phone, city, state, and zip code. List: - Business - Phone - Address - Residence Phone - City - State - Zip Code Assets: - Cash on hand & in Banks - Payable - Savings Accounts - Notes Payable to Banks and Others - IRA or Other Retirement Account - Installment Account (Auto) - Accounts & Notes Receivable - Life Insurance-Cash Surrender Value Only - Monthly Payments (Complete Section 8) - Installment Account (Other) - Stocks and Bonds - Monthly Payments (Describe in Section 3) - Loan on Life Insurance - Mortgages on Real Estate or Rent listed per month - Real Estate - Automobile-Present Value Unpaid Taxes - Other Personal Property Liabilities: - All other Liabilities such as liens, judgments - Other Assets Source of Income: - Contingent Liabilities - Salary - As Endorser or Co-signer - Net Investment Income - Legal Claims & Judgments - Real Estate Income - Other contingent liabilities not listed - Other Income (Describe below) Note: Alimony or child support payments do not need to be disclosed unless desired. List loans, mortgages, credit card accounts, and other indebtedness. The Financial Statement Form is available in various formats, including Personal Financial Statement Form Template from dcu.org and fmb.com. The file types include PDF and DOC, with number of pages ranging from 1 to 5. The details can be viewed by clicking on the file type and number of pages.

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