

# Firstmark Credit Union Personal Financial Statement

## GUARANTOR

Name \_\_\_\_\_ Social Security Number \_\_\_\_\_  
 Residential Address \_\_\_\_\_  
 Daytime Phone \_\_\_\_\_ Email Address \_\_\_\_\_  
 Date of Birth \_\_\_\_\_ Business Name \_\_\_\_\_

### ASSETS

Cash on Deposit (Ck/Sav/MMkt) \$ \_\_\_\_\_  
 Certificates-of-Deposit \$ \_\_\_\_\_  
 Stocks & Bonds (describe below) \$ \_\_\_\_\_  
 IRA, 401(k) & Other Retirement Accounts \$ \_\_\_\_\_  
 Accounts & Notes Receivable \$ \_\_\_\_\_  
 Life Insurance (Cash Surrender Value Only) \$ \_\_\_\_\_  
 Real Estate (describe on page 2) \$ \_\_\_\_\_  
 Auto(s) (Present Value) \$ \_\_\_\_\_  
 Other Personal Property \$ \_\_\_\_\_  
 Other Assets (describe on page 2) \$ \_\_\_\_\_  
 Total of All Assets \$ \_\_\_\_\_

### LIABILITIES

Credit Card Balances (total) \$ \_\_\_\_\_  
 Installment Account Loan - Auto(s) \$ \_\_\_\_\_  
     Monthly Payment (or lease) \$ \_\_\_\_\_  
 Home Equity Loan Balance \$ \_\_\_\_\_  
 Mortgage(s) on Real Estate \$ \_\_\_\_\_  
     Monthly Payment (or rent) \$ \_\_\_\_\_  
 Installment Accounts - Other (i.e boat/rv) \$ \_\_\_\_\_  
     Monthly Payment \$ \_\_\_\_\_  
 Other Loan Totals to a Credit Union or Bank \$ \_\_\_\_\_  
 Unpaid Taxes \$ \_\_\_\_\_  
 Other Liabilities (describe on page 2) \$ \_\_\_\_\_  
 Total of All Liabilities \$ \_\_\_\_\_  
**ASSETS - LIABILITIES = NET WORTH** \$ \_\_\_\_\_

## SOURCES OF INCOME

Monthly Gross Salary \$ \_\_\_\_\_ Other Monthly Income (describe below) \$ \_\_\_\_\_  
 Monthly Net Investment Income \$ \_\_\_\_\_  
 Monthly Real Estate Income \$ \_\_\_\_\_ **TOTAL MONTHLY INCOME** \$ \_\_\_\_\_

## MARKETABLE SECURITIES/STOCKS & BONDS

Name of Security (i.e GE or Dell)	Number of Shares/Bonds	Prior closing day Market Value of all shares/bonds

**LOANS PAYABLE TO CREDIT UNIONS & OTHERS**

Name of Credit Union/Bank	Describe Collateral	Original Balance	Current Balance	Payment Amount	Frequency (i.e. monthly)

**REAL ESTATE**

	Property 1	Property 2	Property 3
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Monthly Payment			

Other Personal Property (describe, including if any is pledged as security)

Other Liabilities Not Disclosed

I authorize Firstmark Credit Union to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify that the preceding disclosures and any attachment(s) submitted with this document are true and accurate as of the stated date(s.) These statements are made for the purpose of either obtaining a loan, guaranteeing a loan or part of continued due diligence to maintain a loan. I understand that false, misleading and omission of facts may result in Firstmark Credit Union electing to pursue legal measures, including an immediate repayment of all loans extended based upon the preceding.

\_\_\_\_\_  
PRINTED NAME

\_\_\_\_\_  
APPLICANT SIGNATURE

\_\_\_\_\_  
DATE

