

Simplified Personal Financial Statement

Submitted to St. Mary's Bank

Date: _____

Please provide information for anyone owning 20% or more of the business. Please attach additional sheets.

Business Name _____

Doing Business As (DBA) Name, if any _____

PERSONAL INFORMATION

Name	Date of Birth
Social Security Number	Home Phone
Street Address	City, State, Zip
Date you moved to this address?	Monthly Payment/Rent
Do you: <input type="checkbox"/> Own <input type="checkbox"/> Rent <input type="checkbox"/> Live with Parents	

EMPLOYER INFORMATION

Name of Employer	% of Ownership
Employer Address	City, State Zip # of Years with Employer
Position	Annual Income Other Income
Employer Phone	Employer Fax

OTHER INFORMATION

Checking Balance	Savings Balance	Name of Financial Institution
Checking Balance	Savings Balance	Name of Financial Institution
Name and Phone No. of your Accountant		
Name and Phone No. of your Attorney		
Name and Phone No. of your Investment Advisor/Broker		
Name and Phone No. of your Insurance Advisor		

PERSONAL FINANCIAL STATEMENTS SCHEDULES

Include totals below in Personal Financial Statement where indicated

SCHEDULE A STOCKS AND BONDS

Number of Shares	Company	Market Value as of _____	Jointly Owned

SCHEDULE B REAL ESTATE

Address (Incl'd City, State & Zip)	Property Type	Date Purchased	Title (Owner?)	Market Value
1.				
2.				
3.				
4.				

PERSONAL FINANCIAL STATEMENTS SCHEDULES (CONTINUED)

Include totals below in Personal Financial Statement where indicated

SCHEDULE C REAL ESTATE/MORTGAGE

Lender	Original Balance	Current Balance	Interest Rate	Monthly Payment	Maturity
1.					
2.					
3.					
4.					

SCHEDULE D CREDIT CARDS/REVOLVING LOANS

Lender	Original Balance	Current Balance	Interest Rate	Monthly Payment	Maturity
1.					
2.					
3.					
4.					

SCHEDULE E INSTALLMENT/OTHER

Lender	Original Balance	Current Balance	Interest Rate	Monthly Payment	Maturity
1.					
2.					
3.					
4.					

FINANCIAL STATEMENT

Assets (What you own)	Liabilities (What you owe)
Cash	Accounts and Bills Due
Stock and Bonds (see schedule A)	Credit Cards (see schedule D)
Retirement Accounts	Automotive Loans (see schedule D)
Real Estate (see schedule B)	Other Loans (see schedule D)
Automobiles	Mortgages (see schedule C)
Other Assets	Total Liabilities
Total Assets	Net Worth (Total Assets minus total Liabilities) \$

	Yes	No	Amount
Are you a guarantor, co-maker, or endorser for any debt of an individual, corporation or partnership?	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
Do you have any outstanding letter of credit or surety bonds?	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
Are there any suits or legal actions pending against you?	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
Are you contingently liable on any lease or contract?	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
Are any of your tax obligations past due?	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

If you answered yes for any of the above, please give details on a separate page.

The information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledges and understands that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. The undersigned represents, warrants, and certifies that the information provided herein is true, correct, and complete. The undersigned agrees to notify you immediately and in writing of any change in name, address, or employment, and of any material adverse change (1) in any of the information contained in this statement, or (2) in the financial condition of the undersigned, or (3) in the ability of the undersigned to perform its obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. If the undersigned fails to notify you as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, you may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, immediately due and payable. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorizes any person or consumer reporting agency to give you any information it may have on the undersigned. The undersigned authorizes you to answer questions about your credit experience with the undersigned. As long as any obligation or guarantee of the undersigned to you is outstanding, the undersigned shall supply annually an updated financial statement. This personal financial statement and other financial or other information that the undersigned gives you shall be your property.

Signature _____

Printed Name _____

Date _____