



Personal Financial Statement

Loan Request Information

As of Date: _____

Amount Requested: _____

Purpose: _____

The following personal financial statement is submitted to Ascentra Credit Union for the purpose of procuring, establishing, and maintaining credit. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein and to determine my/our credit worthiness.

Individual Joint Initial(s) _____
 Information about your spouse need not be provided unless this is a joint statement with your spouse or if you are relying on his or her income or assets to obtain credit. All parties whose assets are relied upon will be requested to sign notes or other documents required in connection with credit extended.

Applicant Information (type or print)		Co-Applicant Information (type or print)	
Full Name:	Birthdate:	Full Name:	Birthdate:
Social Security #:		Social Security #:	
Residence Address: Own <input type="checkbox"/> Rent <input type="checkbox"/>		Residence Address: Own <input type="checkbox"/> Rent <input type="checkbox"/>	
Position/Occupation:		Position/Occupation:	
How Long on Job/Occupation:		How Long on Job/Occupation:	
Email Address:		Email Address:	
Business Name/Employer:		Business Name/Employer:	
Business Address:		Business Address:	
City, State, Zip:		City, State, Zip:	
Res. Phone:	Bus. Phone:	Res. Phone:	Bus. Phone:

Assets		Dollars	Liabilities		Dollars
Cash and on Deposit	(Schedule A)	\$ -	Short-Term Notes Due	(Schedule F)	\$ -
Gov'n't and Listed Securities	(Schedule B)	\$ -	Installment Notes Due	(Schedule F)	
Unlisted Securities	(Schedule B)	\$ -			
Accounts and Notes Receivable	(Schedule C)	\$ -			
Cash Value Life Insurance	(Schedule D)	\$ -	Life Insurance Loans	(Schedule F)	
Residence	(Schedule E)	\$ -			
Other Real Estate Owned	(Schedule E)	\$ -	Real Estate Mortgages	(Schedule E)	\$ -
Retirement Funds					
Vehicles Owned					
Other Personal Property	(Please itemize)		Other Debts/Liabilities	(Please itemize)	
Other Assets			Unpaid Taxes		
			Total Liabilities		\$ -
			Net Worth		\$ -
Total Assets		\$ -	Total Liabilities and Net Worth		\$ -

Annual Income	Dollars	Contingent Liabilities	Dollars
Salary	\$	Endorser:	\$
Other Income	(Itemize)**	Co-maker:	
		Guarantor:	
Spouse Salary		Income Tax:	
Other Income	(Itemize)**	On Leases/Contracts:	
		Other:	
TOTAL	\$ -	TOTAL	\$ -

**Income from alimony, child support, or separate maintenance income need not be revealed if you do not wish Ascentra CU to consider the income in determining your credit worthiness.

Personal Information

Are you a partner/officer in any other venture? If so, describe:
 Have you ever declared bankruptcy? If so, describe:
 Do you have a will/trust? If so, name of personal representative:
 Are you a defendant in any legal actions or suits? If so, describe:

Schedule A (Cash on Hand and Money on Deposit)

Type	Name of Financial Institution	Amount	In Name of	Pledged Yes/No

Schedule B (U.S. Government, Listed & Unlisted Securities) List on separate sheet if necessary

No of Shares of Face Value	Description	Owner(s)	Market Value	Pledged Yes/No
Unlisted Securities				

Schedule C (Accounts and Notes Receivable)

Description	Owned By	Amount Due

Schedule D (Life Insurance Carried-Include Group)

Face Amount	Name of Company	Owner(s)	Beneficiary	Cash Surrender Value

Schedule E (Real Estate)

Address	% Owned	Year Acquired	Market Value	Lender	Loan Balance	Maturity	Monthly Payment
Residence-							

Schedule F (Other Debts) Use additional sheets if necessary

Lender	Current Balance	Interest Rate	Monthly Payment	Secured Yes/No	Type of Collateral

The undersigned certifies that the information contained in this financial statement is true and correct and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. It may be a federal crime punishable by a fine of not more than \$5,000 or imprisonment for not more than two years or both if undersigned knowingly makes false statements concerning any of the above information, under provisions of Title 18, United States Code, Section 1014

Date Signed: _____

Signature _____

Signature of Spouse (if Joint) _____

The Federal Equal Credit Opportunity Act prohibits creditors from discriminating against credit applicants on the basis of race, color, religion, national origin, sex, marital status, age (provided that the applicant has the capacity to enter into a binding contract); because all or part of the applicant's income derives from any public assistance program; or because the applicant has in good faith exercised any right under the Consumer Credit Protection Act. The federal agency that administers compliance with this law concerning this credit union is: **Consumer Response Center, Federal Trade Commission**, 600 Pennsylvania Ave., NW, Washington, DC 20580; 877-FTC-HELP (382-4357)