



Personal Financial Statement

As of _____, 20____

Name(s) _____

Residence address _____

Mailing address (if different) _____

City, state and zip code _____

Home phone # _____ Mobile phone # _____ Business phone # _____

Name of your business _____ % of ownership _____

Assets	\$ Amount (omit cents)	Liabilities	\$ Amount (omit cents)	Monthly Payments
Cash on hand/banks		Accounts payable/credit cards		
Savings and certificates		Notes payable to banks and others (section E)		
IRA/other retirement funds		Installment loans (section F)		
Life insurance, cash value only (section B)		Real estate loans (section D)		
Stocks and bonds		Taxes owed Year(s) _____		
Car(s): Year _____ Make _____		Other liabilities (section G)		
Year _____ Make _____		Total Liabilities		
Boat: Year _____ Make _____		Net worth (assets less liabilities)		
RV: Year _____ Make _____		Contingent Liabilities		
Other personal property (section C)		Endorser or co-maker	\$	
Other assets (section C)		Legal claims or judgments	\$	
Real estate (section D)		Provision for federal income tax	\$	
Total Assets		Other(s)		
		Source of Income		
		Gross Salary		
		Investment Income		
		Real estate income (section D)		
		Other income (section A)		
		Total Income		

Section A - Describe Other Income*

*Alimony, child support and /or public assistance need not be disclosed in "Other Income" unless you would like to have this income counted toward total income.

Section B - Life Insurance

Insured	Name of company, agent and phone #	\$ Face value of policy	Beneficiary

Schedule C - Describe Other Personal Property and Assets

Schedule D - Real Estate Loans

	Property A	Property B	Property C
Type of property			
Location			
Date purchased			
Original cost			
Present market value			
Name and address of title holder			
Name and address of mortgage holder			
Mortgage loan number			
Mortgage balance			
Payment Amount per mo./year			
Rental income			

Schedule E - Notes Payable to Bank and Others

Name and address of note holder	Original balance	Current balance	Monthly payment	Collateral description

Schedule F - Installment Loans

Name and address	Original balance	Current balance	Monthly payment	Collateral description

Schedule G - Describe Other Liabilities

The statements made in this personal financial statement are true and represent a total disclosure of all the information requested as of this date. Mt. McKinley Bank is authorized to contact any reference and any other source of information about my (our) creditworthiness. I (we) consent to allow any information concerning my (our) credit relationship with Mt. McKinley Bank to be given to any credit reporting agency or other creditors.

Signature _____ Date _____ Social Security # _____

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