



**Schedule A - Securities**

No. of Shares (Stock) or Face Value (Bonds)	Description	Owner(s)	Cost	Current Market Value	Check if Pledged or Assigned
Readily Marketable Securities (Including U.S. Government and Municipals, Non-Money Market Mutual Funds)					
Non-Readily Marketable Securities (Closely held business, thinly traded, or restricted stock)					

**Schedule B - Life Insurance**

Policy Owner	Face Amount Of Policy	Type Of Policy	Insurance Company	Cash Surrender Value	Loans Against Policy

**Schedule C - Mortgage Debt; Personal Residence(s) & Real Estate Investments**

Property Address	Legal Owner	Purchase Date	**Market Value	Present Loan Balance	Monthly Payment (Prin + Int)	Monthly Gross Rental Income	Lender

\*\*If appraised within last 12 months, please use appraised value

**Schedule D - Partnership/PC Investments**

Type of Investment	Percent Owned	General Or	Cost	Current Value	Balance Due On Partnerships: Current Debt	Next Contribution Date
Business/Professional (Indicate Name)						

\*\*For investments which represent a material portion of your total assets, please include the relevant financial statements or tax returns and, in the case of partnership investments or S-Corporations, Schedule K-1s.

**Schedule E - Credit Obligations: Amounts Payable To Banks, Nonbanks And/Or Individuals (Include equity lines/loans)**

Lender	Indicate Line Or Loan	Credit Limit For Lines	Collateral	Maturity Date	Unpaid Balance	Monthly Payment (Prin + Int)

**Contingent Liabilities/Other Information**

Are you a guarantor, co-maker, or endorser for any debt or an individual, corporation, or partnership which was not disclosed above? Do you have any outstanding letters of credit or surety bonds? Are there any suits or legal actions pending against you? Are you contingently liable on any lease or contract? Are any of your tax obligations past due? Are any tax returns currently being audited or contested? Have you or any firm in which you were a major owner ever declared bankruptcy? Are significant changes in income statement or balance sheet expected in the next 12 months? Do you have a will? Years since last review (If yes for any of the above, give details or attach information)	Applicant		Co-applicant		Amount
	Yes	No	Yes	No	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

By signing below I acknowledge that the information contained in this Personal Financial Statement is provided to the Bank for the purpose of obtaining or maintaining credit and/or guaranteeing the obligations of a third party. I understand that the Bank is relying on the information provided (including the designation made as to ownership of property) in deciding to grant or continue credit. I represent and warrant that all information is true and complete as of this date and that the Bank may consider this Statement as continuing to be true and correct until a written notice of the change is given by me. The Bank is authorized to make all inquiries it deems necessary to verify the accuracy of the statements made herein and to obtain information regarding my creditworthiness, from an outside source that regularly provides such information. I agree that information obtained along with this Statement shall remain the property of the Bank, whether or not credit is granted.

Signature of Applicant \_\_\_\_\_

Date \_\_\_\_\_

Signature of Co-applicant \_\_\_\_\_

Date \_\_\_\_\_