

U Bank

PERSONAL FINANCIAL STATEMENT

General Information			
Name			
Address	City	State	Zip
Employer:		Position or Profession:	
Employer's Address:		Partner, officer or owner in any other venture? <input type="checkbox"/> No <input type="checkbox"/> Yes If so, explain:	
Are any assets pledged? <input type="checkbox"/> No <input type="checkbox"/> Yes (Detail in Schedule A)		Income taxes settled through (Date):	
Are you a defendant in any suits or legal action? <input type="checkbox"/> No <input type="checkbox"/> Yes If so, explain:		Have you ever taken bankruptcy? <input type="checkbox"/> No <input type="checkbox"/> Yes If so, explain:	
Do you have a will? <input type="checkbox"/> No <input type="checkbox"/> Yes With whom?		Do you have a trust? <input type="checkbox"/> No <input type="checkbox"/> Yes With whom?	
Number of dependents:		Ages:	

Assets	In Even Dollars	Liabilities and Net Worth	In Even Dollars
Cash on hand and in Banks - See Schedule A	0	Notes Payable - See Schedule A	0
Stocks and Bonds - See Schedule B	0	Notes Payable - Relatives	
Homestead - See Schedule C1	0	Unpaid Taxes	
Real Estate Owned - See Schedule C2	0	Credit Card Balances	
Accounts/Notes Receivable - See Schedule D	0	Real Estate Notes Payable - See Schedule C	0
Cash Value Life Insurance - See Schedule E	0	Other Liabilities: Itemize	
Retirement or 401k Plan			
Other Assets: (Itemize)			
		TOTAL LIABILITIES	0
		NET WORTH	0
TOTAL ASSETS	0	TOTAL LIABILITIES AND NET WORTH	0

Contingent Liabilities	In Even Dollars	Contingent Liabilities (continued)	In Even Dollars
As endorser, co-maker or guarantor		Standby letter of credit	
On leases or contracts		Liability in excess of % in partially owned assets	
Legal claims or judgments		Tax Liability if assets sold at stated values	
Income tax claim or disputed amount		Other	
Other special debt (recourse, repurchase liability)			
		TOTAL	0

Schedule A: Banks, Brokers, Savings & Loan Association, Finance Companies or Credit Unions. List the names of all institutions at which you maintain a deposit account and/or where you have loans. Do not include loans secured by real estate (list real estate loans in Schedule C).

Name of Institution	Name on Account	Balance on Deposit	Account Number	Amount Owing	Monthly Payment	Secured by What Assets
TOTALS		0	TOTALS		0	0

Schedule B: U.S. Government Obligations, Stocks (Listed & Unlisted), Bonds (Government & Commercial)

Number of Shares	Name of Stock or Bond	Where Traded	In Name of	Market Value	Pledged	
					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"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
TOTALS				0		

Schedule C1: Homestead

Property Description or Address	Title in Name Of	Year Acquired	Original Amount	Market Value	Mortgage or Land Contract Payable		
					Balance	Payment	Lien Holder
TOTAL			0	0	0	0	

Schedule C2: Other Real Estate Owned (and related debt, if applicable)

Property Description or Address	Title in Name Of	Year Acquired	Original Amount	Market Value	Mortgage or Land Contract Payable		
					Balance	Payment	Lien Holder
TOTAL			0	0	0	0	

Schedule D: Accounts and Notes Receivable

Due From	Original Amount	Maturity	Present Balance	Monthly Payment	Rate	Collectable		Collateral
						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"/>	
TOTALS			0	0				

Schedule E: Life Insurance & Annuities

Name of Company	Face Amount	Cash Value	Loans	Net Cash Value	Beneficiary	Insured
TOTALS				0		

This information is provided for the purpose of obtaining credit for the Applicant(s) or for the purpose of Applicant(s) guaranteeing credit for others. Applicant(s) acknowledge that representations made in this statement will be relied on by the Creditor in its decision to grant such credit. This Statement is true and correct in every detail and accurately represents the financial condition of the Applicant(s) on the date given below. Creditor is authorized to make all inquiries it deems necessary to verify the accuracy of the information contained herein and to determine the creditworthiness of the Applicant(s). Applicant(s) will promptly notify Creditor of

any subsequent changes which would affect the accuracy of this Statement. Creditor is further authorized to answer any questions about Creditor's credit experience with Applicant(s). Applicant(s) are aware that any knowing or willful false statements regarding the value of the above property for purposes of influencing the actions of creditor can be a violation of federal law, 18 U.S.C. &1014, and may result in a fine or imprisonment or both.

In addition, each individual signing below authorizes the Creditor to check their individual credit account and employment history and have a credit reporting agency prepare a consumer credit report on them.

This statement is accurate as of _____.

Applicant's Signature

Date Signed

Social Security Number

Date of Birth

Co -Applicant's Signature

Date Signed

Social Security Number

Date of Birth

PERSONAL CASH FLOW STATEMENT

Name(s):

Date:

Monthly Income

Gross Salary	
Bonuses	
Dividends	
Interest	
Net Rental Income	
Other Business Income	
Note Receivable	
Other (Itemize)	
Total Income	0

Monthly Expenses

Rent/Mortgage Payment	
Auto Loan(s)	
Other Notes Payable	
Credit Card Payment(s)	
Income Taxes	
Utilities	
Living Expenses	
Other (Itemize)	
Total Expenses	0

Net Cash Flow

0

(Income less Expenses)

Signature

Date

Signature

Date