

PERSONAL FINANCIAL STATEMENT

APPLICANT Please complete in INK	
Name:	Birthdate:
Member Number:	SSN:
Address:	Years at This Address:
City/State/Zip:	Home Phone:
Email address:	
Employer:	Occupation:
Work Phone:	Years with This Employer:

SPOUSE / JOINT OWNER	
Name:	SSN:
Employer:	Salary:
Occupation:	Years with Employer:

<i>Please Select One Answer for Each Question</i>	
Do you have any outstanding judgements?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Have you ever filed for bankruptcy?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Have you had property foreclosed or repossessed?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Are you a party in a lawsuit?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Are you other than a U.S. citizen?	<input type="checkbox"/> YES <input type="checkbox"/> NO
Are you a co-maker or co-signer on any other loans?	<input type="checkbox"/> YES <input type="checkbox"/> NO

ASSETS	Balance/Value
Deposits with MFCU	
Deposits with Other Institutions	
Stocks, Bonds, Investments (Complete A on back)	
Investment in Closely Held Company	
Notes Receivable	
Accounts receivable	
Mortgages & Contracts Owned (Complete B on back)	
Real Estate Owned (Complete C on back)	
Automobile(s): Year _____ Make _____	
Year _____ Make _____	
Boat: Year _____ Make _____	
Personal/Household Property	
IRA/Vested Pension Funds	
Cash Value Life Insurance (Complete D on back)	
Other Assets (Describe)	
TOTAL ASSETS	

LIABILITIES	Amount Owed
Credit Cards/Revolving Credit (Complete E on back)	
Margin Account	
Notes Payable to Other Financial Institutions	
Notes Payable to Relatives	
Accounts or Bills Payable	
Income Tax Payable	
Mortgages or Liens on Real Estate	
Automobile/Boat Loan(s) (Complete F on back)	
Alimony/Child Support (annually)	
Other Amounts Owed (Describe) (Complete F on back)	
TOTAL LIABILITIES	
NET WORTH	
TOTAL LIABILITIES & NET WORTH	

SOURCE(S) OF ANNUAL INCOME	Amount
Salary	
Commission or Bonus	
Interest/Dividend Income	
Other Income	
TOTAL INCOME	

ANNUAL EXPENDITURES	Amount
Mortgages/Rent Payments	
Real Estate & Assessments	
Insurance Payments	
Loan Payments	
Other	
TOTAL EXPENDITURES	

A: STOCKS, BONDS & INVESTMENTS List total value on front

Name of Investment:	# of Shares:	Cost:	Current Value:
TOTAL:			

B: MORTGAGES & CONTRACTS OWNED List total balance on front

Description of Property:	Name of Debtor:	Original Amount:	Current Balance:	Payment Schedule:	Amount Past Due:
TOTAL:					

C: REAL ESTATE OWNED List total values on front

Address/Description of Property:	% Owned:	To Whom Indebted:	Year Bought:	Purchase Price:	Current Value:	Loan Balance:	Monthly Income:	Monthly Payment:
TOTAL:								

D: LIFE INSURANCE POLICIES List total owed on front

Name of Company:	Name of Beneficiary:	Face Amount:	Cash Value:	Loans Owing:
TOTAL:				

E: CREDIT CARDS/REVOLVING CREDIT PAYMENTS List total owed on front

Name of Creditor:	Monthly Payment:	Total Amount Owed:
TOTAL:		

F: AUTOMOBILE/BOAT LOANS/OTHER List total owed on front

Name of Creditor:	Monthly Payment:	Total Amount Owed:
TOTAL:		

STATEMENT & SIGNATURE

The information contained in this statement, including supplements, is provided to induce Missoula Federal Credit Union (MFCU) to extend or to continue the extension of credit to You or others upon surety of the undersigned. You acknowledge and understand that MFCU is relying on the information provided herein to grant or continue credit or to accept surety thereof. Each of the undersigned represents, warrants, and certifies that the information provided is true, correct and complete. Each of the undersigned agrees to notify us 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 any of the undersigned or (3) in the ability of any of the undersigned to perform their obligations to MFCU. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. MFCU is authorized to make all inquiries MFCU deems necessary to verify the accuracy of the information contained herein, and to determine your creditworthiness.

Authorized Signature

Date

Spouse/Joint Owner Signature

Date