



# State Bank OF SOUTHERN UTAH

## PERSONAL FINANCIAL STATEMENT

If applying for credit in your own name, check the appropriate box: (Not Applicable for Corporations or LLC's)

- I am applying for an individual account in my own name and relying on my own income and assets.  
 We are applying for a joint account and our assets are jointly held- Initial Below.  
 We are applying for a joint account and our assets are NOT jointly held - Initial Below (Separate Personal Financial Statements required.)

We intend to apply for joint credit (please initial):

Applicant

Co-Applicant

Name(s) _____	Business Phone _____
Residence Street Address _____	Residence Phone _____
City, State & Zip _____	Date of Birth _____
Business Name of Applicant/Borrower _____	Dated as of _____

ASSETS	(Omit cents)	LIABILITIES	(Omit cents)
Cash on hands & in Banks		Accounts Payable	
Savings Accounts		Notes Payable to Bank & Others (Describe in Section 2)	
IRA or Other Retirement Account		Installment Account (Auto) Monthly payments \$	
Accounts & Notes Receivable		Installment Account (Other) Monthly payments \$	
Life Insurance-Cash Surrender Value (Complete Section 8)		Loan on Life Insurance	
Stocks & Bonds (Describe in Section 3)		Mortgages on Real Estate (Describe in Section 4)	
Real Estate (Describe in Section 4)		Unpaid Taxes (Describe in Section 6)	
Automobile - Present Value		Other Liabilities (Describe in Section 7)	
Other Personal Property (Describe in Section 5)		Total Liabilities	
Other Assets (Describe in Section 5)		Net Worth	
<b>TOTAL</b>	<b>\$0.00</b>	<b>TOTAL</b>	<b>\$0.00</b>

Section 1. Source of Income	Contingent Liabilities
Salary	As Endorser or Co-maker
Net Investment Income	Legal Claims & Judgements
Real Estate Income	Provision for Federal Income Tax
Other Income (Describe below)*	Other Special Debt
<b>TOTAL</b>	<b>TOTAL</b>
	<b>\$0.00</b>

Description of Other Income in Section 1.  
 \_\_\_\_\_  
 \_\_\_\_\_

Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

### Section 2. Notes Payable to Bank and Others.

(Use attachments if necessary. Each attachment must be identified as a part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (Monthly, etc.)	How Secured or Endorsed Type of Collateral

<b>Section 3.</b>					
Number of Shares	Name of Securities	Cost	Market Value Quotation/Exchange	Date of Quotation/Exchange	Total Value

**Section 4.** List each parcel separately. Use attachment if necessary. Each attachment must be identified as a part of this statement and signed.

	Property A	Property B	Property C
Type of Property			
Street Address			
City, State & Zip Code			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Address of Mortgage Holder			
City, State & Zip Code			
Mortgage Account Number			
Mortgage Balance			
Amount of Payment per Month/Year			
Status of Mortgage			

**Section 5.** Describe, and if any pledged as security, state name and address of lien holder, amount of lien & terms of payment.

**Section 6. Unpaid Taxes** Describe in detail, as to type, to whom payable, when due, amount and to what property, if any, a tax lien attaches.

**Section 7. Other Liabilities** Describe in detail.

**Section 8. Life Insurance Held** Give face amount and cash surrender value of policies, name of insurance company and beneficiaries.

I hereby certify that all statements made by me on this financial statement are true and complete, and I authorize you to make any credit inquiries you feel necessary. These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. Any credit investigation and information furnished you by any person or consumer reporting agency is hereby authorized, and is to remain your property.

Signature \_\_\_\_\_ Date \_\_\_\_\_ Social Security # \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_ Social Security # \_\_\_\_\_