



STATE BANK OF SOUTHERN UTAH

PERSONAL FINANCIAL STATEMENT

Dated As of:

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 accounts 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)
Residence Street Address
City, State & Zip
Business Name

Residence Phone
Business Phone
Date of Birth

ASSETS		(Omit cents)	LIABILITIES		(Omit cents)
Cash, Savings Accounts, & CD's			Notes Payable to Bank & Others (Describe in Section 2)		
Stocks & Bonds (Describe in Section 3)			Accounts Payable (Include Credit Cards)		
Accounts & Notes Receivable			Installment Account (Auto/Other) (Describe in Section 2)		
Life Insurance - Cash Surrender Value (Describe in Section 9)			Unpaid Taxes (Describe in Section 7)		
Real Estate - Current Market Value (Describe in Section 4)			Mortgages on Real Estate (Describe in Section 4)		
Closely Held Business Interests (Describe in Section 5)			Home Equity Line of Credit (HELOC)		
IRA or Other Retirement Account			Loan on Life Insurance		
Other Personal Property (Describe in Section 6)			Other Liabilities (Describe in Section 8)		
Automobile - Present Value			Total Liabilities		
Other Assets (Describe in Section 6)			Net Worth		
TOTAL ASSETS			TOTAL LIABILITIES AND NET WORTH		
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		
TOTAL			TOTAL		

Section 1. Description of Other Income

*Please only include alimony or child support payments if they should be counted toward total income.

Section 2. Notes Payable to Bank and Others / Installment Accounts

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

[illegible]

Section 3. Stocks and Bonds

[illegible]

Section 4. Real Estate

**List each parcel seperately. Use attachments 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			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Monthly Payment			
	Property D	Property E	Property F
Type of Property			
Street Address			
City, State & Zip Code			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Monthly Payment			

Section 5. Closely Held Business Interests

[illegible]

Section 6. Other Personal Property / Other Assets

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

Section 7. Unpaid Taxes

**Describe in detail. (i.e. type, to whom payable, due date, amount, property description, and tax liens)*

Section 8. Other Liabilities

**Describe in detail.*

Section 9. 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 # _____