



PERSONAL FINANCIAL STATEMENT

| | | | |
|-----------------------|--|---|--|
| Name | | Spouse Name (if co-borrower or guarantor) | |
| Address | | Address | |
| City, State, Zip Code | | City, State, Zip Code | |
| Date of Birth | | Date of Birth | |
| SS # | | SS # | |
| Home Phone | | Home Phone | |
| Business Phone | | Business Phone | |
| Cell Phone | | Cell Phone | |
| Email | | Email | |
| Employer | | Employer | |
| How Long | | How Long | |
| Job Title | | Job Title | |

ASSETS

LIABILITIES

| | | | |
|---|--|---|--|
| Cash/Checking | | Accounts Payable and Credit Cards | |
| Savings Accounts | | Notes Payable to Banks and Others (describe in section 5) | |
| Retirement Accounts | | Loans on Life Insurance | |
| Stocks and Bonds (describe in section 1) | | Loans on Real Estate (describe in section 2) | |
| Real Estate (describe in section 2) | | Tax liabilities | |
| Personal Property | | Other Liabilities (describe in section 6) | |
| Vehicles | | | |
| Business Ownerships (describe in section 3) | | | |
| Cash Value Life Insurance (describe in section 4) | | Total Liabilities | |
| Total Assets | | Net Worth | |

ANNUAL SOURCES of INCOME

ANNUAL SOURCES of INCOME

(Co-Borrower/Guarantor)

| | |
|---|--|
| Salary | Salary |
| Investment Income | Investment Income |
| Real Estate Income | Real Estate Income |
| Social Security Income | Social Security Income |
| Other (describe below)* | Other (describe below)* |
| Description of Other Income : | Description of Other Income : |
| *Alimony or child support payments need not be disclosed in "Other" unless it is desired to have such payments counted toward total income. | * Alimony or child support payments need not be disclosed in "Other" unless it is desired to have such payments counted toward total income. |
| OTHER INFORMATION | OTHER INFORMATION (Co-Borrower/Guarantor) |
| Are you an endorser or co-maker on any Notes? | Are you an endorser or co-maker on any Notes? |
| Are you a defendant in any legal action? | Are you a defendant in any legal action? |
| Have you ever filed Bankruptcy? | Have you ever filed Bankruptcy? |
| If yes to any of the above, please explain: | If yes to any of the above, please explain: |

PLEASE COMPLETE ALL SECTIONS

| Section 1. Stocks and Bonds (Use attachments if necessary) | | | | | |
|---|------------------|--------------------------|---------------------------|----------------------|-------------------------------|
| Number of Shares | Name of Security | Market Value | Date of Market Value | Total Value | Is this a Retirement Account? |
| | | | | | |
| | | | | | |
| | | | | | |
| Section 2. Real Estate Owned | | | | | |
| Address | % Owned | Market Value | Outstanding Loan Balances | Owed To | Monthly Payment |
| | | | | | |
| | | | | | |
| | | | | | |
| Section 3. Business Ownerships | | | | | |
| Business Name | Position/Title | % Ownership | Business Net Worth | Current Market Value | Type of Business |
| | | | | | |
| | | | | | |
| | | | | | |
| Section 4. Life Insurance (List even if no cash value) | | | | | |
| Life Insurance Company | Policy Owner | Beneficiary/Relationship | Face Amount | Loans | Current Cash Value |
| | | | | | |
| | | | | | |
| | | | | | |
| Section 5. Notes Payable to Banks and Others (Not including mortgages listed in Section 2 above) | | | | | |
| Lender | Origination Date | Balance | Monthly Payment | Collateral | Term |
| | | | | | |
| | | | | | |
| | | | | | |
| Section 6. Other Liabilities (Please describe in detail) | | | | | |
| | | | | | |

By signing below I hereby certify that the information contained in this form and the attachments affixed are true and accurate as of the date indicated below. I authorize 4Front Credit Union and/or its underwriting partner to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. These statements are made for the purpose of either obtaining a loan or guaranteeing a loan. I authorize 4Front Credit Union to release information regarding my business and personal information to alternative lending sources in order to facilitate the possibility of receiving cooperative funding if necessary.

Signature _____ Date _____

Signature _____ Date _____