



DRAKE BANK
Where small business is big!

Personal Financial Statement

CONTACT YOUR REPRESENTATIVE AT THE BANK IF YOU HAVE ANY
QUESTIONS REGARDING THE COMPLETION OF THIS FORM

YOU MAY APPLY FOR A CREDIT EXTENSION OR FINANCIAL ACCOMMODATION INDIVIDUALLY OR JOINTLY WITH A CO-APPLICANT. THIS STATEMENT AND ANY APPLICABLE SUPPORTING SCHEDULES MAY BE COMPLETED JOINTLY BY BOTH MARRIED AND UNMARRIED CO-APPLICANTS IF THEIR ASSETS AND LIABILITIES ARE SUFFICIENTLY JOINED SO THAT THE STATEMENT CAN BE MEANINGFULLY AND FAIRLY PRESENTED ON A COMBINED BASIS; OTHERWISE SEPARATE STATEMENTS AND SCHEDULES ARE REQUIRED.

APPLICANT:

NAME: _____
ADDRESS: _____
CELL PHONE: _____
EMPLOYER: _____
EMAIL: _____

SOCIAL SECURITY#: _____
HOME PHONE: _____
DATE OF BIRTH: _____
POSITION: _____ Yrs: _____
WORK PHONE: _____

APPLICANT:

NAME: _____
ADDRESS: _____
CELL PHONE: _____
EMPLOYER: _____
EMAIL: _____

SOCIAL SECURITY#: _____
HOME PHONE: _____
DATE OF BIRTH: _____
POSITION: _____ Yrs: _____
WORK PHONE: _____

DATE: _____

*Round all amounts to the nearest \$100

*Attach separate sheet if you need more space to complete detail

ASSETS		AMOUNT	LIABILITIES		AMOUNT
Cash in this Bank			Notes Payable Banks	Sch. 7	
Cash in Other Banks (Detail)			Notes Payable Others	Sch. 7	
			Installment Contracts Payable	Sch. 7	
			Due Dept. Stores, Credit Cards & Others		
Due from Friends, Relatives & Others	Sch. 1		Income Taxes Payable		
Mortgage(s) & Contracts for Deed Owned	Sch. 2		Other Taxes Payable		
Securities Owned	Sch. 3				
Retirement/401k Accounts	Sch. 3		Loans on Life Insurance	Sch. 4	
Cash Surrender Value of Life Insurance	Sch. 4				
Homestead	Sch. 5		Mortgage(s) on Homestead	Sch. 6	
Other Real Estate Owned	Sch. 5		Mortgage(s) or Liens on other Real Estate	Sch. 6	
Automobiles					
			Other Liabilities		
Personal Property			Child Support		
Other Assets (Detail)					
			TOTAL LIABILITIES		\$0
			Net Worth (Total Assets Less Total Liabilities)		\$0
TOTAL		\$0	TOTAL		\$0

ANNUAL INCOME	APPLICANT	CO-APPLICANT	CONTINGENT LIABILITIES	
Salary				
Commission				
Dividends				
Interest				
Rentals				
Alimony, child support or maintenance (you need not show this unless you wish us to consider it)				
TOTAL INCOME	\$0	\$0	TOTAL CONTINGENT LIABILITIES	\$0

SCHEDULE 1 DUE FROM FRIENDS, RELATIVES & OTHERS

Name of Debtor	Owed To	Collateral	How Payable	Maturity Date	Unpaid Balance
			/per		
			/per		
			/per		
TOTAL					\$0

SCHEDULE 2 MORTGAGE(S) AND CONTRACT FOR DEED(S) OWNED

Name of Debtor	Type of Property	1st or 2nd Lien	Owed To	How Payable	Unpaid Balance
				/per	
				/per	
				/per	
				/per	
TOTAL					\$0

SCHEDULE 3 SECURITIES OWNED

No. of Shares or Bond Amt.	Description	In Whose Names Registered	Cost	Present Market Value	L-Listed U-Listed
SCHEDULE 3 RETIREMENT/401K			TOTAL	\$0	\$0
			TOTAL	\$0	\$0

SCHEDULE 4 LIFE INSURANCE

Insured	Insurance Company	Beneficiary	Face Value of Policy	Cash Value	Loans
TOTAL				\$0	\$0

SCHEDULE 5 HOMESTEAD & OTHER REAL ESTATE OWNED

Address and Type of Property	Title in Name (s) of	Monthly Income	Cost / Year Acquired	Present Market Value	Amount of Insurance
TOTAL				\$0	\$0

SCHEDULE 6 MORTGAGE(S) OR LIENS ON REAL ESTATE

To Whom Payable	How Payable	Interest Rate	Maturity Date	Unpaid Balance
	/per			
	/per			
	/per			
	/per			
	/per			
TOTAL				\$0

SCHEDULE 7 NOTES PAYABLE BANKS & OTHERS AND INSTALLMENT CONTRACTS PAYABLE

To Whom Payable	Address	Collateral or Unsecured	How Payable	Unpaid Balance
			/per	
			/per	
			/per	
			/per	
			/per	
TOTAL				\$0

DECLARATIONS:

Have you ever gone through bankruptcy or had a judgment against you?

Are any assets pledged or debts secured except shown?

Have you made a will?

Number of dependents?
(If "None" check None)

Marital Status (answer only if this financial statement is provided in connection with a request for secured credit or applicant is seeking a joint account with spouse.)

APPLICANT		CO-APPLICANT	
<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
<input type="checkbox"/> YES	<input type="checkbox"/> NO	<input type="checkbox"/> YES	<input type="checkbox"/> NO
_____	<input type="checkbox"/> NONE	_____	<input type="checkbox"/> NONE
<input type="checkbox"/> MARRIED		<input type="checkbox"/> MARRIED	
<input type="checkbox"/> SEPARATED		<input type="checkbox"/> SEPARATED	
<input type="checkbox"/> UNMARRIED		<input type="checkbox"/> UNMARRIED	

(Unmarried includes single, divorced, widowed)

The foregoing statement, submitted for the purpose of obtaining credit, is true and correct in every detail and fairly shows my/our financial condition at the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition occurring before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve the credit in connection with which it is submitted. You are authorized to check my/our credit report and employment history or any other information contained herein.

THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.

Date

Your Signature

Date

Co-Applicant Signature

(if you are requesting the financial accommodation jointly)



DRAKE BANK MLS# 466969

www.drake-bank.com

IMPORTANT NOTICE:

COMPLETE THIS SECTION ONLY IF THE LOAN PURPOSE IS FOR HOME PURCHASE, HOME IMPROVEMENT OR REFINANCE

INFORMATION FOR GOVERNMENT MONITORING PURPOSES

Important Notice to Applicants and Co-Applicants

The following information is requested by the federal government for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal credit opportunity, fair housing, and home mortgage disclosure laws. You are not required to furnish this information but are strongly encouraged to do so. You may select one or more designations from "Race." The law provides that a lender may not discriminate on the basis of this information, or on whether you choose not to furnish it. However, if you choose not to furnish the information and you have made this application in person, under federal regulations the lender is required to note ethnicity, race, and sex on the basis of visual observation or surname. If you do not wish to furnish the information, please check the appropriate box below.

	APPLICANT	CO-APPLICANT
<input type="checkbox"/> I AGREE to provide the information requested	Initial _____ Date _____	Initial _____ Date _____
<input type="checkbox"/> I DO NOT wish to provide the information requested	Initial _____ Date _____	Initial _____ Date _____

1 Ethnicity

Hispanic or Latino	<input type="checkbox"/> YES	<input type="checkbox"/> YES
Not Hispanic or Latino	<input type="checkbox"/> YES	<input type="checkbox"/> YES

2 Race (you may select more than one):

American Indian or Alaskan Native	<input type="checkbox"/> YES	<input type="checkbox"/> YES
Asian	<input type="checkbox"/> YES	<input type="checkbox"/> YES
Black or African American	<input type="checkbox"/> YES	<input type="checkbox"/> YES
Native Hawaiian or Pacific Islander	<input type="checkbox"/> YES	<input type="checkbox"/> YES
White	<input type="checkbox"/> YES	<input type="checkbox"/> YES

3 Sex

<input type="checkbox"/> MALE	<input type="checkbox"/> FEMALE	<input type="checkbox"/> MALE	<input type="checkbox"/> FEMALE
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Government monitoring information completed by Lender Initial _____ Date _____

FOR BANK USE ONLY:

Application received by: Lender Initials: _____ Date: _____

Last Updated: May 6, 2013



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