



Personal Financial Statement

As of _____ 20 _____

Name(s) _____
 Residence address _____
 Mailing address (if different) _____
 City, state and zip code _____
 Home phone # _____ Mobile phone # _____ Business phone # _____
 Email _____
 Name of your business _____ % of ownership _____

Assets	\$ Amount (omit cents)	Liabilities	\$ Amount (omit cents)	Monthly Payments
Cash on hand/banks		Accounts payable/credit cards		
Savings and certificates		Notes payable to banks and others (section E)		
IRA/other retirement funds		Installment loans (section F)		
Life insurance, cash value only (section B)		Real estate loans (section D)		
Stocks and bonds		Taxes owed Year(s) _____		
Car(s): Year Make		Other liabilities (section G)		
Year Make		Total Liabilities/Monthly Payments		
Boat: Year Make		Net worth (assets less liabilities)		
RV: Year Make		Contingent Liabilities		
Other personal property (section C)		Endorser or co-maker		
Other assets (section C)		Legal claims or judgements		
Real estate (section D)		Provision for federal income tax		
Total Assets		Other(s)		
		Source of Income		
		Gross Salary		
		Investment Income		
		Real estate income (section D)		
		Other income (section A)		
		Total income		

Section A - Describe Other Income*

*Alimony, child support and/or public assistance need not be disclosed in "Other Income" unless you would like to have this income counted toward total income.

Section B - Life Insurance

Insured	Name of company, agent and phone#	\$ Face value of policy	Beneficiary

Section C - Describe Other Personal Property and Assets

Section D - Real Estate Loans

	Property A	Property B	Property C
Type of property			
Location			
Date purchased			
Original cost			
Present market value			
Name and address of title holder			
Name and address of mortgage holder			
Mortgage loan number			
Mortgage balance			
Payment amount per mo./year			
Rental income			

Section E - Notes Payable to Bank and Others

Name and address of note holder	Original balance	Current balance	Monthly payment	Collateral description

Section F - Installment Loans

Name and address	Original balance	Current balance	Monthly payment	Collateral description

Section G - Describe Other Liabilities

The statements made in this personal financial statement are true and represent a total disclosure of all the information requested as of this date. Mt. McKinley Bank is authorized to contact any reference and any other source of information about my (our) creditworthiness. I (we) consent to allow any information concerning my (our) credit relationship with Mt. McKinley Bank to be given to any credit reporting agency or other creditors.

Signature	Date	Social Security #
Signature	Date	Social Security #