



PERSONAL FINANCIAL STATEMENT

FOR SECURITY PURPOSES, DO NOT RETURN THE COMPLETED STATEMENT VIA E-MAIL
CONFIDENTIAL - PLEASE DO NOT LEAVE ANY QUESTIONS UNANSWERED

For the purpose of procuring and maintaining credit from time to time in any form whatsoever with Campus Credit Union, for claims and demands against the undersigned, the undersigned submits the following as being a true and accurate statement of his/her financial condition on the following date, and agree that if any change occurs that materially reduces the means or ability of the undersigned to pay all claims or demands against him/her, the undersigned will immediately and without delay notify Campus Credit Union, and unless the credit union is so notified it may continue to rely upon the statement herein given as a true and accurate statement of the financial condition of the undersigned as of the close of business.

Full Name	SSN	Full Name	SSN
Street Address		Street Address	
City, State	Zip	City, State	Zip
Since	Owned or Rented	Since	Owned or Rented
Previous Address if less than 5 years		Previous Address if less than 5 years	
City/State/Zip		City/State/Zip	
Since	Owned or Rented	Since	Owned or Rented
Birth Date	Dependents excluding self	Birth Date	Dependents excluding self
Phone: Residence	Work	Phone: Residence	Work
Employer	Since	Employer	Since
Address		Address	
Position/Title		Position/Title	
E-Mail Address		E-Mail Address	

Data needs to be entered in Schedules 1 - 11 in order for the Assets and Liabilities section to calculate.

ASSETS			LIABILITIES		
Cash (Schedule 1)	\$	-	Insurance Loans (Schedule 3)	\$	-
Securities (Schedule 2)	\$	-	Profit Sharing & Pension Loans (Schedule 5)	\$	-
Cash Value of Life Insurance (Schedule 3)	\$	-	Retirement Accounts (Schedule 6)	\$	-
Mortgages and Contracts Held by You (Schedule 4)	\$	-	Mortgages on Home (Schedule 7)	\$	-
Profit Sharing & Pension (Schedule 5)	\$	-	Mortgages on Other Real Estate (Schedule 8)	\$	-
Retirement Accounts, Including IRA Accounts (Schedule 6)	\$	-	Short Term Notes Due to Financial Institutions (Schedule 10)	\$	-
Primary Residence (Schedule 7)	\$	-	Short Term Notes Due to Others (Schedule 11)	\$	-
Other Real Estate (Schedule 8)	\$	-	Installment Loans and Contracts (Schedule 12)	\$	-
Automobiles (Schedule 9)	\$	-	Credit Account and Bills Due (Schedule 13)	\$	-
Other Assets (Schedule 9)	\$	-	Contingent Liabilities (Schedule 14)	\$	-
			Other Liabilities (Schedule 15)	\$	-
TOTAL Assets		\$ -	TOTAL Liabilities		\$ -
			Net Worth		\$ -

Statement of Financial Condition as of _____

ANNUAL INCOME				
Salary				
Commissions				
Dividends				
Interest				
Rentals				
Alimony, Child Support or Maintenance (you need not show this unless you wish us to consider it)				
Other				
	TOTAL INCOME	\$0.00	TOTAL INCOME	\$0.00

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Schedule 1 / Cash. Savings & Certificates of Deposit

Name of Bank or Financial Institution	How Owned (Joint, Ind., Trust)	Type of Account	Account Balance
TOTAL			\$0.00

Schedule 2 / Securities Owned or Attach Brokerage Statement

No. of Shares	Description	Registered in Names of	Listed/Unlisted	Current Market Value
TOTAL				\$0.00

Schedule 3 / Life Insurance

Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans
TOTAL			\$0.00	\$0.00	\$0.00

Schedule 4 / Receivables Due to Me on Mortgages on Contracts I Own

Name of Debtor	Description of Property	1st or 2nd Lien	Date of Maturity	Repayment Terms	Balance Due
TOTAL					\$0.00

Schedule 5 / Profit Sharing and Pension

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
TOTAL		\$0.00	\$0.00	\$0.00

Schedule 6 / Retirement Accounts and IRA Accounts

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
TOTAL		\$0.00	\$0.00	\$0.00

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Schedule 7 / Primary Real Estate Owned

Property Type / Address	Year Acquired	Name of Creditor	Purchase Price	Mortgage Balance	Maturity Date	How Owned (Joint, Ind., Trust)	Repayment Terms	Current Market Value
Primary								
TOTAL			\$0.00				TOTAL	\$0.00

Schedule 8 / Other Real Estate Owned

Property Type / Address	Year Acquired	Name of Creditor	Purchase Price	Mortgage Balance	Maturity Date	How Owned (Joint, Ind., Trust)	Repayment Terms	Current Market Value
TOTAL			\$0.00				TOTAL	\$0.00

Automobiles (Describe)		Value	Other Assets (Describe)		Value
	TOTAL	\$0.00		TOTAL	\$0.00

Name of Creditor	Collateral	Maturity Date	Repayment Terms		Balance Due
			TOTAL		\$0.00

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Name of Creditor	Collateral	Maturity Date	Repayment Terms		Balance Due
			TOTAL		\$0.00

Name of Creditor	Collateral	Maturity Date	Repayment Terms		Balance Due
			TOTAL		\$0.00

Name of Company	Repayment Terms		Balance Due
		TOTAL	\$0.00

Schedule 14 / Contingent Liabilities

Contingent Liabilities (Describe)		Amount
As Endorser		
As Grantor		
Lawsuits		
For Taxes		
Other (Detail)		
TOTAL		\$0.00

Schedule 15 / Other Liabilities

Other Liabilities (Describe)		Amount
TOTAL		\$0.00

Name of Accountant

Attorney

Yes

No

In the last 7 years, have you had any unsatisfied judgments or declared bankruptcy?

In the last 7 years, have you had property foreclosed upon or given title or deed in lieu thereof?

Do you have any unused credit facilities at other financial institutions?

Year

Have you prepared a will and / or estate plan? What year?

You certify that the information provided in this statement is true and correct. So long as you owe any sums to Campus Credit Union, you agree to give Campus Credit Union prompt written notice of any material change in your financial condition and upon request, you agree to provide Campus Credit Union with an updated personal financial statement. Campus Credit Union is authorized to retain this personal financial statement and verify by whatever means it deems necessary your credit and employment history or any other information in this statement. This statement does not obligate Campus Credit Union to make any loan even if you meet the normal standards the credit union considers in determining whether to approve or deny credit.

Signature

Date

Signature

Date