

Personal Financial Statement

All individuals owning 20% or more of the business must complete this form and submit with the Business Loan/Credit Card Application



Phone: 802/800 371-5162
 Fax: 802-225-1066
 Email: info@vsecu.com

Contact Information

Last Name: _____ First Name: _____
 Social Security #: _____ - _____ - _____ Date of Birth: ____ / ____ / ____ Email: _____
 Home Phone #: _____ Business Phone #: _____

Present Address

Own Rent Years at Address: _____

Previous Address *(if at present address less than two years)*

Own Rent Years at Address: _____

Employer: _____

Position/Title: _____

Years with Employer: _____

Salary: _____

Previous Employer: _____

(if at present employer less than two years)

Position/Title: _____

Years with Employer: _____

Salary: _____

Income

Salary \$ _____ Net Investment Income \$ _____ Real Estate Income \$ _____

Other Income \$ _____ Describe details of other income: _____

Assets

Available Cash in Hand/Banks/Credit Unions \$ _____
 Other Savings Account(s) \$ _____
 IRA or Other Retirement Account(s)..... \$ _____
 Securities (*Stocks and Bonds*) \$ _____
 Life Insurance (*Cash Surrender Value*) \$ _____
 Term Life Insurance (*No Cash Value*) \$ _____
 Real Estate \$ _____
 Automobile(s) \$ _____
 Other Personal Property* \$ _____
 Other Assets* \$ _____

TOTAL \$ _____

*Describe details of other personal property and assets:

Notes Payable to Banks, Credit Unions, and Others *(auto, mortgages, etc.)*

Name of Creditor	Original Balance	Current Balance	Payment Amount/ Frequency	Type of Collateral

List any other liabilities: _____

Real Estate Owned

Property Details	Property 1	Property 2	Property 3
Type of Property			
Address			
Date Purchased			
Original Cost			
Present Market Value			
Name of Mortgage Holder			
Mortgage Balance			
Payment Amount			
Property Taxes			
Insurance Company			

Authorization and Certification

I authorize VSECU to make inquires as necessary to verify the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are accurate as of the stated date(s). These statements are made for the purpose of either obtaining a loan or guaranteeing a loan.

Signature: _____

Date Signed: _____