



PERSONAL FINANCIAL STATEMENT

Business Information

Business Legal Name

Doing Business as (DBA):

Please provide information for anyone owning 10% or more of the business. (Attach additional sheets if necessary.)

We will accept an Accountant prepared financial statement attached to this form along with a member signature acknowledging this form and disclosures.

Owner/Guarantor

Name	
Officer Title	Sole Proprietorship or Business Individual: Owner Partnership: Partner Limited Partner Limited Liability Co: Member Managing Member Corp: President Vice President Corp Secretary Other: _____
Date of Birth:	
Social Security Number:	
Home/Cell Phone:	
Street Address	
City, State, Zip	
Date you moved to address:	
Monthly Housing Expense	(Principal, Interest, Taxes & Interest) or Rent \$
Total Annual Income:	
% of ownership	
US Citizen:	
Checking Balance:	Savings Balance:
Presently Bank at:	

Personal Financial Statement

	As of:
ASSETS (What You Own)	
Cash	\$
Stocks and Bonds (see Schedule A)	\$
Retirement Accounts	\$
Real Estate (see Schedule B)	\$
Automobiles	\$
Other Assets	\$
Estimated Value of Business (Borrower)	
Total Assets	
LIABILITIES (What You Owe)	
Accounts and Bills Due	
Credit Cards/Revolving Accounts (see Schedule D)	
Installment/Other Loans (see Schedule E)	
Mortgages and Home Equity Loans (see Schedule C)	
Total Liabilities	
Net Worth (Total Assets minus Total Liabilities)	

Personal Financial Statement Schedules

Schedule A – Stocks and Bonds

Number of Shares	Company	Market Value as of:	Jointly Owned
1			
2			
3			
4			

Schedule B – Real Estate

Address (City, State, Zip)	Property Type (owner-occupied or investment)	Date Purchased	Title (who owns)	Market Value

Schedule C – Real Estate Mortgage and Home Equity Loans (Follow order of Schedule B)

Lender	Original Balance	Current Balance	Monthly Payment	Rate	Maturity
1	\$	\$	\$	%	
2	\$	\$	\$	%	
3	\$	\$	\$	%	
4	\$	\$	\$	%	

Schedule D – Credit Cards/Revolving Loans

Lender	Original Balance	Current Balance	Monthly Payment	Rate	Maturity
1	\$	\$	\$	%	
2	\$	\$	\$	%	
3	\$	\$	\$	%	
4	\$	\$	\$	%	

Schedule E – Installment/Other

Lender	Original Balance	Current Balance	Monthly Payment	Rate	Maturity
1	\$	\$	\$	%	
2	\$	\$	\$	%	
3	\$	\$	\$	%	
4	\$	\$	\$	%	

Declarations

Please provide details on an additional page to any question with a YES response.

Yes No 1. Is the Owner or any of the proposed guarantors party to any lawsuit or subject to outstanding judgments?
 Yes No 2. Is the Owner or any of the proposed guarantors party to taxes or credit obligations past due?
 Amount: \$ _____ Payable to: _____
 Yes No 3. Has the owner or any of the proposed guarantors ever filed personal bankruptcy or served as an officer in a company that declared bankruptcy?
 Yes No 4. Is the Owner or any of the proposed guarantors presently under indictment, probation, parole, or ever been charged or convicted for any criminal offense other than a minor motor vehicle violation?
 Yes No 5. Is the Owner or any of the proposed guarantors, a political party, a campaign, a candidate, a public official or an immediate family member of such an official, or a business entity formed by or for the benefit of any Public Official. If yes, Name, Relationship, and Position of Official: _____
 Yes No 6. Is the Owner, or any of the proposed guarantors an employee of Azura Credit Union?
 If yes, name of employee _____

Owner/Guarantor Signature

Name of Primary Owner/Guarantor (please print) _____ Signature _____
 _____ **X** _____ Date ____/____/____

Authorization

The owner/guarantor signing above hereby authorize the Lender, and any of its duly authorized agents, to obtain and use my credit reports and to exchange credit information in connection with this business loan application and any update, renewal, account review, or extension the Lender may require. Additionally, I hereby authorize the Lender to obtain my personal credit report(s), and/or to make employment or investigation inquiries deemed necessary by the Lender in connection with this business loan application. I have a right to ask if a consumer credit report was requested, and if a report was requested, and if I ask, I will be informed of the name and address of the consumer reporting agency that furnished the report. I understand and agree that the Credit Union can furnish information concerning my personal and business accounts to consumer reporting agencies and others who may properly receive that information. It is understood that a photocopy or fax of this form will also serve as authorization. I understand that I must update this credit information at the Lender's request and/or if my financial condition changes.

Lender complies with section 326 of the USA Patriot Act. Lender may also ask to see your driver's license or any other state issued photo identifying documentation. The law mandates the Lender verify certain information about you, including your name, legal address, date of birth, and Social Security or tax identification number, while processing your account application.