

» PERSONAL FINANCIAL STATEMENT

APPLICANT INFORMATION			
Name:		Date of Birth:	
Address:			
City:		State:	Zip Code:
Social Security #:	Driver's License #:	Issue Date:	Expiration Date:
Contact Phone #:		Work Phone #:	
Occupation:	Employer:	No. of Years:	

STATEMENT OF FINANCIAL CONDITION AS OF:				
ASSETS	AMOUNT (OMIT CENTS)	LIABILITIES	AMOUNT OWING (OMIT CENTS)	MONTHLY PAYMENT (OMIT CENTS)
Cash on Hand & Banks	\$	Notes Payable Banks (Schedule C)	\$	\$
IRA or Retirement Accounts	\$	Installment Notes (Schedule D)	\$	\$
Accounts and Notes Receivable	\$	Bank Credit Cards (Schedule E)	\$	\$
Stocks and Bonds (Schedule A)	\$	Other Revolving Debt (Schedule F)	\$	\$
Insurance (Cash Surrender Value)	\$	Alimony, Child Support, Etc.	\$	\$
Real Estate (Schedule B)	\$	Auto Loans (Schedule G)	\$	\$
Vehicles: Yr Make	\$	Equipment Loans (i.e. Boats, RVs) (Schedule H)	\$	\$
Vehicles: Yr Make	\$	Real Estate Loans (Schedule I)	\$	\$
Vehicles: Yr Make	\$	Other Liabilities: (Describe Below)	\$	\$
Home Furnishings	\$	Other Liabilities:	\$	\$
Equipment	\$	Other Liabilities:	\$	\$
Other Investments	\$	Other Liabilities:	\$	\$
Other:	\$	Other Liabilities:	\$	\$
Other:	\$	Other Liabilities:	\$	\$
Other:	\$	Other Liabilities:	\$	\$

SCHEDULE A - STOCKS AND BONDS

Description	Owners	Source of Valuation	No. of Shares	Value	Listed or Unlisted

SCHEDULE B - REAL ESTATE

Address or Location	Description (residence, rental, business, vacation home)	Owner(s) of Record	Present Value	Monthly Income (if applicable)

SCHEDULE C - NOTES PAYABLE BANK

Name of Bank	Collateral	Person(s) Liable	Balance Due	Monthly Payment

SCHEDULE D - INSTALLMENT NOTES

Payable To	Collateral	Person(s) Liable	Balance Due	Monthly Payment

SCHEDULE E - BANK CREDIT CARDS

Name of Bank	Person(s) Liable	Balance Due	Monthly Payment

Supply Spouse information if this is an application for joint credit with your spouse, or if your spouse is to be a Guarantor on proposed Business Loan, OR, if you live in a community property state.

SPOUSE INFORMATION			
Name:		Date of Birth:	
Address:			
City:		State:	Zip Code:
Social Security #:	Driver's License #:	Issue Date:	Expiration Date:
Contact Phone #:		Work Phone #:	
Occupation:	Employer:		No. of Years:

SIGNATURES AND AFFIRMATION SECTION		
<p>I (we) have provided information in this application truthfully. I (we) authorize Clackamas Federal Credit Union to verify or check any of the information given, check credit references, verify employment, and obtain one or more credit reports in connection with the credit application or in connection with any periodic review of any loans or credit which may be extended to me (us). If I am married and live in a community property state, this authorization is also made on behalf of my spouse even if he or she is not a co-applicant.</p> <p>I (we) give all of my (our) creditors permission to give Clackamas Federal Credit Union any information it needs to make a credit granting decision. I (we) give Clackamas Federal Credit Union permission to report to credit reporting agencies and others the results of such investigations and Clackamas Federal Credit Union's experience with my (our) loan account.</p>		
Applicant Name:	Applicant Signature:	Date:
Spouse's Name:	Spouse's Signature*:	Date:

*Spouse need not sign unless he or she is a co-applicant or guarantor.