

GREATAMERICA BANK NATIONAL ASSOCIATION ("GREATAMERICA BANK") - PERSONAL FINANCIAL STATEMENT				DATE	
Important: Read these Directions before completing this Personal Financial Statement.					
Check Appropriate Box	☐	If you are applying for an individual account in your own name and are relying on your own income or assets and not the income or assets of another person as the basis for repayment of the credit request, complete only the borrower sections.			
	☐	Co-Borrower section for both personal information and sources of income below.			
	We intend to apply for joint credit (initial or sign) Applicant _____ Co-Applicant _____				
	Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation. If you do want us to consider it, include it below.				
Borrower			Co-Borrower		
Residence Address			Residence Address		
City, State & Zip			City, State & Zip		
Position / Title			Position / Title		
Employer Name			Employer Name		
Employer Address			Employer Address		
City, State & Zip			City, State & Zip		
Res. Phone		Bus. Phone	Res. Phone		Bus. Phone
S.S. No.		Birth Date	S.S. No.		Birth Date

ASSETS			LIABILITIES		
	Description	In Dollars		Payment	In Dollars
Bank Accounts (GreatAmerica)			Notes payable to relatives		
Bank Accounts (Other)			Unpaid Taxes		
Stocks/ Bonds/ Mutual Funds (see Schedule A)			Real Estate: Residence (see Schedule B)		
Real Estate: Residence (see Schedule B)			Real Estate: Other (see Schedule B)		
Real Estate: Other (see Schedule B)			Other Debts/Collateral:		
Notes Receivable					
Furniture, Fixtures, Guns					
Automobiles					
Vested Retirement Fund					
Equity In Bus./ Part./ Corp.					
Cash Value - Life Ins. (see Schedule C)					
Other Assets - Itemize:					
Account Receivable					
HOUSEHOLD GOODS					
			TOTAL LIABILITIES		
			NET WORTH		
TOTAL ASSETS			TOTAL LIABILITIES AND NET WORTH		

SCHEDULE A - STOCKS / BONDS / MUTUAL FUNDS / SECURITIES		
Investment Description (# Shares, Face Values, etc.)		Tax Sheltered?
		Y N
		Y N
		Y N
		Y N
		Y N

SCHEDULE B - REAL ESTATE OWNED									
Address	Yr. Acq.	Cost	Mkt. Value	Mtg Amt	Mortgage Holder	Rate	Principal & Int	Taxes, Ins & Maint	
									Residence
	Second Mortgage							Gross Rent	Adj Gross Rent 65%
	Third Mortgage								

SCHEDULE C - LIFE INSURANCE CARRIED, INCLUDING GROUP INSURANCE					
Name of Insurance Company	Owner of Policy		Beneficiary	Face Amount	Policy Loans

SOURCES OF INCOME FOR YEAR ENDED		PERSONAL INFORMATION	
Gross monthly income (Borrower)		Do you have any contingent liabilities, such as co-maker, guarantor, company debt, etc. ? If so, describe below.	Y N
Gross monthly income (Co-Borrower)			
Investment income (mo.)		Do you have a will? If so, name of executor: Are you a partner or an officer in any venture? If so, describe:	Y N
Other income	Net Rental Income From Sched B		Y N
Other income			Y N
TOTAL MONTHLY INCOME		Are any assets pledged other than as described on schedules?	Y N
Are you obligated to pay alimony, child support, etc.	Y N	If so, describe:	
If so, describe:		Are you a defendant in any suits or legal actions?	Y N
Housing Rent (pmt)		If so, describe:	
Total other monthly payment (from above)		Have you ever been declared bankrupt in the last 7 years?	Y N
TOTAL MONTHLY PAYMENTS		If so, describe:	
		Name of Tax Prep:	
PITI Ratio		Name of Attorney:	
Debt Ratio			
Income tax settled through (date)			

I/We, the undersigned, do hereby certify that the within financial report is a true and correct statement of my/our financial condition and that this report is submitted to GreatAmerica Bank for Credit Purposes. You authorize GreatAmerica Bank to obtain consumer reports and other information from consumer reporting agencies for credit evaluation and, if approved, for account maintenance, review, update, renewal, and collection. You also authorize verification of employment, income, assets, liabilities, and other information with third parties. The undersigned acknowledge(s) receipt of a copy of this instrument.

Signature	Date	Signature	Date
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