

Platinum Federal Credit Union

PERSONAL FINANCIAL STATEMENT

As of _____ 20__

Personal Information:

Name: _____ Social Security Number: _____

DOB: _____

SECTION A: ASSETS

SECTION B: LIABILITIES

Cash & Bank Account	\$	Mortgages Payable	\$
U S Gov & Marketable Sec		Partnership Related Debt	
Investments in Partnership		Notes Payable	
Real Estate		OTHER LIABILITIES	
		Credit Card Debt	
OTHER ASSETS		Auto Liability	
Personal Property		Taxes Payable	
Automobiles		Misc.	
Notes Receivable		NET WORTH (A-B)	
TOTAL ASSETS (A)	\$	TOTAL LIABILITIES (B)	\$

SECTION C: INCOME AND EXPENSE INFORMATION

INCOME (Monthly)		EXPENSES (Monthly)	
Gross wages or Salaries	\$	Mortgage Payment	\$
Commissions, Bonuses etc.		Taxes	
Partnership Draws, etc.		Partnership Contribution	
Partnership Distributions.		Credit Card payment	
Interest & Dividends		Automobile Payment	
Rental Income		Rent	
Other		PFCU Payment	
		Other	
		TOTAL EXPENSES (B)	\$
TOTAL INCOME (A)	\$	NET FLOW (A-B)	\$

Debt to Income Ratio: $\frac{\text{Debts} =}{\text{Income} =}$ _____

To: Platinum Federal Credit Union

Information contained in this statement is provided for the purpose of obtaining, or maintaining credit with you on behalf of the undersigned, or persons, firm or corporations in whose behalf the undersigned may either severally or jointly with other, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of change is given to you by the undersigned. You are authorized to make all inquires you deem necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. You are authorized to creditworthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (Applicant) : _____

Signature (Co-Applicant) : _____

Date Signed: _____

Date Signed: _____