



# SECURITY BANK & TRUST CO.

## PERSONAL FINANCIAL STATEMENT

LEARN MORE ABOUT OUR 21 CONVENIENT LOCATIONS:

[www.security-banks.com](http://www.security-banks.com)

I may apply for a credit extension, loan or other financial accommodation alone or together with someone else (“co-applicant”). If I apply with a co-applicant and our combined assets and debts can meaningfully and fairly be presented together, the co-applicant and I may complete this required statement and any supporting schedules jointly. Otherwise separate forms and schedules are required.

**CONTACT YOUR REPRESENTATIVE AT SECURITY BANK & TRUST CO. IF YOU HAVE ANY QUESTIONS REGARDING THE COMPLETION OF THIS FORM.**

Individual 1	
Legal Name	Social Security Number
Address	
Telephone Number	Date of Birth
E-mail Address	
Present Employer	Position
Employer Address	
Individual 2	
Legal Name	Social Security Number
Address	
Telephone Number	Date of Birth
E-mail Address	
Present Employer	Position
Employer Address	

## Assets and Liabilities

**Date of Valuation:**

- Round all amounts to nearest \$100.
- Attach separate sheet if you need more space to complete detail schedule.

Assets	Amount	Liabilities	Amount
Cash in this bank		Notes Payable Banks (Sch. 7)	
Cash in Other Banks		Notes Payable Others (Sch. 7)	
		Installment Contracts Payable (Sch. 7)	
		Due Dept Stores, Credit Cards & Others	
IRA or Retirement Accounts (IRA, 401k)		Income Taxes Payable	
Due from Friends, Relatives & Others (Sch. 1)		Other Taxes Payable	
		Loans against Life Insurance (Sch. 4)	
Mortgage & Contracts for Deed Owned		Mortgage or Liens on Homestead	
Securities Owned (Sch. 3)		Mortgage or Liens on other Real Estate Owned (Sch. 6)	
Cash Surrender Value of Life Ins. (Sch. 4)			
Homestead (Sch. 5)		Other Liabilities (Detail)	
Other Real Estate Owned (Sch. 5)			
Automobiles			
Personal Property			
Other Assets (Detail)			
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES</b>	
<b>NET WORTH (Total Assets - Total Liabilities)</b>			

## Income and Contingent Liabilities

Annual Income	Applicant	Co-Applicant	Contingent Liabilities	
Salary			As Endorser	
Commissions			As Guarantor	
Dividends			Lawsuits	
Interest			For Taxes	
Rentals			Other (Detail)	
Alimony, child support or maintenance (you need not show this unless you wish us to consider it for repaying this loan.)				
Other			Check here if "none"	
<b>Total Income</b>			<b>Total Contingent</b>	



**SCHEDULE 7- Notes Payable, Banks & Others and Installment Contracts Payable**

To Whom Payable	Address	Collateral or Unsecured	How Payable	Unpaid Balance
			\$ per	
			\$ per	
			\$ per	
			\$ per	
			\$ per	
			\$ per	

**Declarations**

	APPLICANT		CO-APPLICANT			APPLICANT		CO-APPLICANT	
	YES	NO	YES	NO		YES	NO	YES	NO
Are there any outstanding judgments/tax liens against you?					Have you directly or indirectly been obligated on any loan which resulted in foreclosure, transfer of title in lieu of foreclosure, or judgment?				
Have you been declared bankrupt within the past 10 years?					Are you presently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation, bond, or loan guarantee?				
Have you had property foreclosed upon or given title or deed in lieu thereof in the last 7 years?					Are you obligated to pay alimony, child support, or separate maintenance?				
Are you a party to a lawsuit?					Is any part of the down payment borrowed?				
Are you a co-maker or endorser on a note?					Have you had an ownership interest in a property in the last three years? (1) What type of property did you own -- principal residence (PR), second home (SH), or investment property (IP)? (2) How did you hold title to the home -- solely by yourself (S), jointly with your spouse (SP), or jointly with another person (O)?				
Are you a U.S. citizen?					Are there any other equity loans on the property?				
Are you a permanent resident alien?					Do you intend to occupy the property as your primary residence?				

**Acknowledgement and Agreement**

The foregoing statement, submitted for the purpose of obtaining credit, is true and correct in every detail and fairly shows my/our financial condition at the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve the credit in connection with which it is submitted. You are authorized to check my/our credit and employment history or any other information contained herein.

THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.

\_\_\_\_\_  
Your Signature & Date

\_\_\_\_\_  
Co-Applicant Signature & Date (if you are requesting the financial accommodation jointly)