



PERSONAL FINANCIAL STATEMENT

Name: _____

Address: _____

City, State, Zip: _____

Assets Any item of economic value owned by an individual	Amount in Dollars
Cash - Checking Accounts	
Cash - Savings Accounts	
Certificates of Deposit	
Securities - Stocks / Bonds / Mutual Funds	
Life Insurance <i>(the cash value of a whole life insurance policy payable before death)</i>	
Personal Property <i>(autos, jewelry, etc.)</i>	
Retirement Funds <i>(TSP, IRAs, 401k, etc.)</i>	
Real Estate <i>(market value)</i>	
Other assets <i>(specify)</i>	
Other assets <i>(specify)</i>	
Total Assets	

Liabilities An obligation that legally binds an individual to settle a debt	Amount in Dollars
Credit Card Balances <i>(itemize on back)</i>	
Installment Loans <i>(itemize on back)</i>	
Taxes Payable	
Real Estate Mortgages <i>(itemize on back)</i>	
Other liabilities <i>(specify)</i>	
Other liabilities <i>(specify)</i>	
Total Liabilities	

Net Worth The value of an individual's assets minus all liabilities	
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I/ We certify that this is a true and complete statement being submitted for the purpose of obtaining credit from CDC Federal Credit Union:

X _____
 Applicant Date

Itemized Assets

	Property Address	Market Value	Mortgage Balance
Real Estate Owned			

	Description of Property	Market Value	Loan Balance
Personal Property			

	Financial Institution's Name	Account Number	Balance
Bank Accounts			

Itemized Liabilities

	Creditor's Name	Account Number	Balance
Credit Card			
Installment Loans			
Real Estate Loans			
Other Liabilities			