

Please email completed forms to:  
 questloanreferrals@navigantcu.org, fax to:  
 401-233-4758, or drop off at any branch location.



## PERSONAL FINANCIAL STATEMENT

All information contained herein effective as of \_\_\_\_\_, 20 \_\_\_\_

INDIVIDUAL INFORMATION			
Name:		Social Security Number:	
Description of Business:			
Date of Birth:		Driver's License Number:	
Address: (Street, City, State, Zip)			
Home Telephone ( )		Cell Phone ( )	
Employer:		Employer Address:	
Length of Employment:	Position:	Work Telephone ( )	

ANNUAL INCOME		CONTINGENT LIABILITIES	
SALARY	\$	Do you have any ...	<b>Amount</b>
BONUSES AND COMMISSIONS	\$	Contingent Liabilities (as co-borrower, guarantor or endorser)	\$
DIVIDENDS AND INTEREST	\$	Involvement in pending legal actions?	\$
REAL ESTATE INCOME	\$	Other special debt or circumstances?	\$
OTHER INCOME:	\$	Past due taxes?	\$
<b>TOTAL ANNUAL INCOME</b>	<b>\$</b>	<b>TOTAL CONTINGENT LIABILITIES</b>	<b>\$</b>

PERSONAL INFORMATION	
Attorney Name, Address and Telephone Number:	
Accountant Name and Telephone Number:	
Primary financial institution:	
Have you ever declared bankruptcy?	Date filed: Date discharged:
Do you have a will?	Trust?
Do you have any liens or judgments filed against you?	

FINANCIAL CONDITION				
ASSETS	Amount	LIABILITIES	Amount	Monthly Payment
CASH (See Schedule A)	\$	NOTES & LOANS (See Schedule E)	\$	\$
STOCKS & BONDS (See Schedule B)	\$	CREDIT CARD AND OTHER REVOLVING ACCOUNTS (See Schedule F)	\$	\$
REAL ESTATE – Primary Residence (See Schedule C)	\$	REAL ESTATE NOTES/MORTGAGES - Primary Residence (See Schedule C)	\$	\$
REAL ESTATE - Investment and Other RE Owned (See Schedule C)	\$	REAL ESTATE NOTES/MORTGAGES - Investment and Other RE Owned (See Schedule C)	\$	\$
NOTES RECEIVABLE	\$	TAXES DUE	\$	\$
LIFE INSURANCE (Cash surrender value only)	\$	INSURANCE LOAN	\$	\$
OTHER ASSETS - Personal Property, Autos, etc. (See Schedule D)	\$	OTHER LIABILITIES (See Schedule G)	\$	\$
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES</b>		
<i>Attach additional documentation if necessary</i>		<b>NET WORTH (Total Assets minus Total Liabilities)</b>		

<b>SCHEDULE A – Cash on hand</b>		
Name of Institution	Name(s) on Account	Balance on Deposit
		\$
		\$
		\$

<b>SCHEDULE B – Stocks, Bonds and Other Marketable Securities</b>		
Number of Shares	Name of Security	Market Value
		\$
		\$
		\$

<b>SCHEDULE C – Real Estate Owned (Attach additional sheets if necessary)</b>				
	Property A	Property B	Property C	Property D
Type of Property				
Address				
Title in Name of				
Date Purchased				
Original Cost				
Present Market Value				
Name of Mortgage Holder				
Mortgage Balance				
Monthly Payment Amount				

<b>SCHEDULE D – Other Assets (Please describe in detail, including estimated market value)</b>

<b>SCHEDULE E – Notes and Loans</b>			
Name of Institution	Balance	Monthly Payment	Security
	\$	\$	
	\$	\$	
	\$	\$	

<b>SCHEDULE F – Credit Cards and Other Revolving Accounts</b>			
Name of Institution	Balance	Monthly Payment	Security
	\$	\$	
	\$	\$	
	\$	\$	

<b>SCHEDULE G – Other Liabilities (Please describe in detail, including balance, monthly payment and maturity date)</b>

I hereby affirm that the foregoing information contained in this document is presented for the purpose of obtaining credit as of the date indicated and is true, complete and correct. I understand that Navigant Credit Union is relying on this statement and other information presented in evaluating this application and, if approved, in extending credit/making loan(s) to the applicant. Navigant Credit Union is authorized to conduct whatever inquiries it deems necessary in connection with this application and obtain additional information concerning the Applicant(s)/Guarantor(s). I authorize and instruct any person or consumer reporting agency to furnish to Navigant Credit Union any information that it may have or obtain in response to such credit inquiries. Verification or re-verification of any information contained in the application may be made at any time by Navigant Credit Union, its agents, successors and assigns. I acknowledge that Navigant Credit Union has not made any commitment to approve this application and extend credit, unless otherwise agreed to in writing. I understand that Navigant Credit Union will retain this and any other information in connection with this application whether or not credit is granted. Any intentional misrepresentation of the information presented could result in criminal action under federal law.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Print Name and Title \_\_\_\_\_