

**FIRST SECURITY BANK – MISSOULA**1704 Dearborn Ave (406) 728-3115  
Missoula, MT 59801**PERSONAL FINANCIAL STATEMENT**

You may apply for an extension of credit individually or jointly with another applicant. This statement and any applicable supporting schedules may be completed jointly by co-applicants if their assets and liabilities can be meaningfully and fairly presented on a combined basis, otherwise separate statements and schedules must be provided.

For obtaining credit from time to time with the bank, the following statement and information are furnished as a complete, true, and accurate statement of the financial condition of the undersigned

on: \_\_\_\_\_, 20\_\_\_\_ Please round all amounts to the nearest \$100.

I/we are applying for credit on  an individual basis OR  a joint basis. (Please check one)

X \_\_\_\_\_ X \_\_\_\_\_  
 Applicant's Signature Date Co-Applicant's Signature Date

APPLICANT			CO-APPLICANT		
Name			Name		
Address			Address		
City	State	Zip Code	City	State	Zip Code
Date of Birth			Date of Birth		
Social Security Number			Social Security Number		
Telephone Number		Cellular Number	Telephone Number		Cellular Number
Employer		How Long	Employer		How Long
Position/Title			Position/Title		
Dependents/Include Self			Dependents/Include Self		
Marital Status * Do not provide this information if your application is for individual, unsecured credit Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/>			Marital Status *do not provide this information if your application is for individual unsecured credit Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/>		

ASSETS		LIABILITIES	
Cash (Schedule 1)		Short Term Notes and Loans Due (Schedule 6)	
Securities (Schedule 2)		Credit Accounts and Bills Due (Schedule 7)	
Life Insurance Cash Value (Schedule 3)		Life Insurance Loans (Schedule 3)	
Mortgages and Contracts Held by You (Schedule 4)		Mortgages of Primary Residence (Schedule 5)	
Primary Residence (Schedule 5)		Mortgages on Other Real Estate (Schedule 5)	
Other Real Estate (Schedule 5)		Taxes	
Profit Sharing (Net of Loans)		Other Liabilities (Describe)	
Pension and Retirement Accounts, Include IRA Accounts		Other Liabilities (Describe)	
Automobiles (Describe)			
Personal Property			
Other Assets (Describe)		<b>Total Liabilities \$</b>	
<b>Total Assets \$</b>		(Total Assets Less Total Liabilities) <b>Net Worth \$</b>	

ANNUAL INCOME	APPLICANT	CO-APPLICANT	PLEASE ANSWER EACH QUESTION (YES or NO)	APPLICANT	CO-APPLICANT
Salary			Are you a Co-maker, Endorser, or Guarantor on any other person's debt?		
Bonuses/Commissions					
Dividends/Interest			Are you a defendant in any suit or legal action?		
Net Real Estate Rent					
Income from alimony, child support or maintenance payments need not be entered unless you want it considered as a basis for repayment.			Have you ever gone through bankruptcy or had a judgment against you?		
Other (list)			Have you made a will?		
<b>Total \$</b>					

**SCHEDULE 1 / CASH ON HAND AND IN BANKS**

Name of Bank or Financial Institution	Type of Account	Account Balance
<b>Total \$</b>		

**SCHEDULE 2 / SECURITIES OWNED**

Number of Shares	Description	Registered in Name(s) of	Listed or Unlisted	Current Market Value
<b>Total \$</b>				

**SCHEDULE 3 / LIFE INSURANCE**

Insurance Company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans
			\$	\$	
<b>Totals \$</b>					

**SCHEDULE 4 / RECEIVABLES DUE TO ME ON MORTGAGES AND CONTRACTS I OWN**

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Repayment Terms			Current Market Value
				\$	per		
					per		
					per		
<b>Total \$</b>							

**SCHEDULE 5 / REAL ESTATE OWNED**

Description of Property	Year Acquired	Purchase Price	Insured Value	Mortgage Balance	Date of Maturity	Repayment Terms			Current Market Value
		\$	\$	\$		\$	per		
Primary Residence <input type="checkbox"/> Yes <input type="checkbox"/> No		Name of Mortgage Company:							
							per		
Primary Residence <input type="checkbox"/> Yes <input type="checkbox"/> No		Name of Mortgage Company:							
							per		
Primary Residence <input type="checkbox"/> Yes <input type="checkbox"/> No		Name of Mortgage Company:							
							per		
Primary Residence <input type="checkbox"/> Yes <input type="checkbox"/> No		Name of Mortgage Company:							
							per		
<b>Total \$</b>					<b>Total \$</b>				

**SCHEDULE 6 / SHORT TERM NOTES AND LOANS DUE**

Name of Creditor	Collateral	Date of Maturity	Repayment Terms			Balance Due
			\$	per		
				per		
				per		
				per		
				per		
				per		
				per		
<b>Total \$</b>						

**SCHEDULE 7 / CREDIT ACCOUNTS AND BILLS DUE**

Name of Company	Repayment Terms			Balance Due
	\$	per		
		per		
		per		
		per		
		per		
		per		
<b>Total \$</b>				

We hereby certify that the information provided in this statement is true and correct. So long as we owe any sums to the bank, we agree to give the bank prompt written notice of any material change in our financial condition. The Bank is authorized to retain this personal financial statement whether or not credit is approved and is further authorized to verify our credit and employment history or any other information in this statement. This application does not obligate the bank to make any loan even if we meet the normal standards the bank considers in determining whether to approve or deny the application.

X X

\_\_\_\_\_  
**Applicant's Signature** **Date** \_\_\_\_\_  
**Co-Applicant's Signature** **Date**