MCDEVCO Personal Finance Statement



Circle Type of Entity:

LLP C-Corp S-Corp

Partnership

Sole Proprietor

Date:

LLC

_____ Loan Request: \$_____ Percent of Ownership:___

Everyone that owns 20% or more in the company will have to complete a Personal Finance Statement annually for the term of the loan

	Applica	ant			Co-Applicant				
Full Name					Full Name				
Street Address				Street Address					
City/State/Zip					City/State/Zip				
County					County				
Since	Owned		Rented		Since		Owned		Rented
Social Security Numb	per	D	ate of Birth		Social Security Number		Da	ate of Birth	
Phone: Residence	١	Vork			Phone: Residence Wo		Work	ork	
Employer					Employer				
Address					Address				
Position/Title		Si	nce		Position/Title		Sir	Since	
Previous Employer			Previous Employer						
Position/Title How Long			Position/Title How Lon		ow Long				
Dependents (Include self)			Dependents (Include Self)						
Marital Status			Marital Status						

*Annual Income	Applicant	Co-Applicant	Please Answer Each Question (Yes /No)	App.	Co-App
Salary			Are you a Co-Maker, Endorsers, or Guaran- tor of any other person's debt?		
Bonuses/Commissions			Are you a defendant in any suit or legal ac- tion?		
Dividends/Interest			Have you ever gone through bankruptcy or		
Net Real Estate Income			had a judgement against you?		
Other (List)			Have you made a will?		
Total					

*Please contact your banker if you need assistance with completing these schedules. Round all amounts to the nearest \$100.00

** Income from all alimony, child support, or maintenance payments need not be entered unless you want it considered as a base for repayment

**PLEASE COMPLETE SCHEDULES 1-9 BELOW AND ON FOLLOWING PAGES BEFORE COMPLETING THIS TABLE

Assets	Liabilities
Cash (Schedule 1)	Short Term Notes Due Financial Insts. (Schedule 8)
Securities (Schedule 2)	Short Term Notes Due to Others (Schedule 8)
Life Insurance Cash Value (Schedule 3)	Credit Accounts and Bills Due (Schedule 9)
Mortgage and Contracts Held by You (Schedule 4)	Insurance Loans (Schedule 3)
Homestead (Schedule 5)	Installment Loans and Contracts (Schedule 8)
Other Real Estate (Schedule 5)	Mortgages on Home (Schedule 5)
Retirement Accounts, including IRA Accts (Schedule 6)	Mortgages on Other Real Estate (Schedule 5)
Automobile (Described)	Taxes
Personal Property	Other Liabilities (Describe)
Other Assets (Describe)	
Profit Sharing & Pension (Schedule 7)	Total \$
Total \$	(Total Assets Less Total Liabilities) Net Worth \$

Schedule 1 / Cash, Savings and Certificates

Name of Bank or Financial Institution	Type of Account	Account Balance
	Total \$	

Schedule 2 / Securities Owned

Par Value or No. of Shares	Description	Registered in Name(s) of	Listed or Unlisted - specify	Current Market Value
			Tatal ¢	

Total \$

Schedule 3 / Life Insurance

Insurance company	Insured	Beneficiary	Face Value of Policy	Cash Value of Policy	Loans

Schedule 4 / Receivables Due to Me on Mortgages and Contracts Owned

Name of Debtor	Description of Property	First Lien or Second Lien	Date of Maturity	Payment Term (Month)	Balance Due with Date
				Total \$	

Schedule 5 / Real Estate Owned

Property Description	Name of Creditor	Year Acquired	Purchase Price	Date of Maturity	Payment Term (Monthly)	Current Market Value
					Total \$	

Insurance Co:_____

Agent:_____

Schedule 6 / IRA and Retirement Accounts

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
			Total \$	

Schedule 7 / Profit Sharing and Pension

Name of Institution	Type of Account	Account Balance	Amount Totally Vested	Loans
			Total \$	

Schedule 8 / Installments, Credit Lines and Notes (Short-Term)

Name of Creditor	Collateral	Date of Maturity	Payment Term (Monthly)	Balance Due
	-		Total \$	

Schedule 9 / Credit Accounts, Bills Due, Alimony/Child Support, Daycare, Etc.

Name of Company	Payment Term (Monthly)	Balance Due

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

Applicant's Signature

Date

Co-Applicant's Signature

Date