



Strategic Urban Lending

**PERSONAL STATEMENT CONFIDENTIAL**

**IMPORTANT:** Read these directions before completing this statement.

If you are applying for individual credit in your own name and are relying on your own income or assets and not the income or assets of another person as the basis for repayment of the credit requested, complete only Section 1 and related schedules.

If you are applying for joint credit with another person, complete all sections, providing information in Section 2 about the borrower.

If you are applying for individual credit, but are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, complete all sections to the extent possible, providing information in Section 2 about the person on whose alimony, support, or maintenance payments or income or assets you are relying.

If this statement relates to your guaranty of the indebtedness of other person(s), firm(s), or corporation(s), complete Section 1 and related schedule.

If Section 2 is complete, the remainder of the form should be completed giving information about both the borrower and the co-borrower, using a separate sheet where necessary. Please indicate whether assets are individually or jointly owned. If Section 2 is not completed, give only information about the borrower in the form.

<b>SECTION 1 – INDIVIDUAL INFORMATION (type or print)</b>			<b>SECTION 2 – OTHER INFORMATION ( type or print)</b>		
Name:			Name:		
Residence Address:			Residence Address:		
City, State, Zip:			City, State, Zip:		
Position or Occupation:			Position or Occupation:		
Business Name:			Business Name:		
Residence Phone:			Residence Phone:		
Business Phone:			Business Phone:		
<b>SECTION 3 – STATEMENT OF FINANCIAL CONDITION AS OF _____, 20_____.</b>					
<b>ASSETS</b>			<b>LIABILITIES AND NET WORTH</b>		
Depository Assets (Schedule A)			Notes payable to banks secured (Schedule E)		
U.S. Government Securities (Schedule B)			Notes payable to banks unsecured (Schedule E)		
Stocks and Bonds, listed (Schedule B)			Notes payable to other (Schedule E)		
Unlisted (Schedule B)			Taxes payable		
Real Estate Cost Market (Schedule C) (Do not deduct mortgages)			Real Estate Mortgages (Schedule E)		
Automobiles			Life Insurance Policy Loans (Schedule D)		
			Consumer Loans including credit cards (itemize)		
Other Assets (itemize)			Other Liabilities (itemize)		
			TOTAL LIABILITIES		
			NET WORTH		
TOTAL ASSETS			TOTAL LIABILITIES AND NET WORTH		
<b>AMOUNTS AND SOURCE OF INCOME</b>			<b>GENERAL INFORMATION</b>		
Salary:			Have you ever been declared bankrupt? If so, describe.		
Bonus:					
Commission:					
Dividends/Interest					
TOTAL:			Are you a director of any entity? If so, describe.		
(Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.)			Are you obligated to pay alimony, child support, or separate maintenance payments? If so, describe.		
AMOUNTS AND SOURCE OF OTHER INCOME:					
TOTAL:			Do you have a WILL?		
			Name of Executor (s)		

CONTINGENT LIABILITIES	AMOUNT	NAMES OF CREDITOR (S) – CREDIT GRANTORS
As endorser, co-maker or guarantor		
Other contingent liabilities		

PLEASE FILL OUT SCHEDULES WHERE REQUIRED

Schedule A – Depository Accounts

NAME & ADDRESS OF INSTITUTE	TYPE OF ACCOUNT	ACCOUNT IN NAME OF	ACCOUNT NUMBER	BALANCE

Schedule B – Schedule of Securities Owned

eee

COMPLETE DESCRIPTION	IN NAME OF	MARKET VALUE AT STATEMENT DATE	AMOUNT PLEDGED TO SECURE LOAN

Schedule C – Schedule of Real Estate Owned

DESCRIPTION & LOCATION	TITLE IN NAME OF	% OWNERSHIP	APPRAISED VALUE	COST	MORTGAGES

Schedule D – Life Insurance

INSURING COMPANY	FACE AMOUNT	CASH SURRENDER VALUE	POLICY LOAN	OWNER	BENEFICIARY

Schedule E – Schedule of Notes, Mortgages, and Loans Payable

AMOUNT	CREDIT IN NAME OF	PAYABLE TO WHOM	DATED	MATURITY	SECURITY PLEDGED, IF ANY

The information contained in this statement is provided for the purpose of obtaining or maintaining credit with you on behalf of the undersigned, or person(s), firm(s) or corporation(s) in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue to credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquires you deem necessary to verify the accuracy of this statement made herein, and to determine my/our credit worthiness. You are authorized to answer questions about your credit experience with me/us.

Signature (individual) \_\_\_\_\_

Social Security No. \_\_\_\_\_

Date of Birth \_\_\_\_\_

Date Signed \_\_\_\_\_

Signature (other party, if applicable) \_\_\_\_\_

Social Security No. \_\_\_\_\_

Date of Birth \_\_\_\_\_