

CO-OP CREDIT UNION PERSONAL FINANCIAL STATEMENT

For the purpose of obtaining credit from the Co-op Credit Union and any future credit granted by Co-op Credit Union, or to support the extension of credit already given, I (we) make the following statement to Co-op Credit Union of my (our) FINANCIAL CONDITION as of the date of application. All assets are "marital property" unless specifically noted or marked as individual property, "I". NOTICE TO MARRIED APPLICANTS: No provision of a marital property agreement, an unilateral statement under Wis. Stat. Sec.766.59 or a court decree under Wis. Stat. Sec. 766.70 adversely affects the interest of the credit union unless prior to the time the credit is extended, the credit union is furnished with a copy of the agreement, statement of decree, or has actual knowledge of the adverse provision when the obligation to the credit union is occurred.

Date of Statement: _____

Applicant	SS #	Date of Birth
Co-Applicant	SS #	Date of Birth
Address - City - State - Zip		Phone#
E-Mail	Cell Phone#	



ASSETS	LIABILITIES
Cash on Hand & in any Financial Inst. ----- \$ -	Accounts Payable to Venders & Individuals ----- (Provided a Separate Breakdown) \$ -
Checking & Savings Accounts----- (Provided Statement of Accounts) \$ -	Accounts/Loans Payable to Financial Inst. ----- (Describe in Section 4.) \$ -
IRA's or Other Retirement Accounts ----- (Provided Statement of Accounts) \$ -	Accounts/Loans for (Autos)----- (Describe in Section 4.) \$ -
Accounts & Notes Receivable----- (Provided Aging Report) \$ -	Loans on Life Insurance Policy ----- \$ -
Life Insurance- Cash surrender Value ----- (Provided a copy of Life policies) \$ -	Mortgage Loans on Real Estate ----- (Describe in Section 2.) \$ -
Stocks, Bonds & Mutual Funds ----- (Provided Statement of Accounts) \$ -	Unpaid Taxes (Real Estate/ Income/ Payroll, etc..) ----- \$ -
Real Estate Owned ----- (Describe in Section 2.) \$ -	Other Liabilities----- (Includes Credit Cards, Medical, Dental, etc...) \$ -
Automobiles, Cycles, Other Recreational ----- (Describe in Section 3.) \$ -	Total Liabilities----- \$ -
Other Personal Property ----- \$ -	Net Worth \$ -
Other Assets----- \$ -	Total \$ -
Total Assets----- \$ -	

Section 1. Sources of Income	Contingent Liabilities
Total Salary ----- \$ -	Co-signer or Endorser ----- \$ -
Net investment Income ----- \$ -	Legal Claims & Outstanding Judgments ----- \$ -
Real Estate Income ----- \$ -	Other Obligation----- \$ -
Other Income (Describe Below) ----- \$ -	

Describe other income in Section 1.

Note: **Alimony or Child Support payments need not be disclosed in "Other Income" unless it is desired to have the income count towards total income

Section 2. Real Estate Owned:	(Attach a list if needed)		
	Property A	Property B	Property C
Type of Real Estate: (e.g. Primary Residence, 2nd Home, Rental, Land, etc.)			
Address:			
Date Purchased			
Original Cost	\$ -	\$ -	\$ -
Present Value	\$ -	\$ -	\$ -
Mortgage Holder			
Mortgage Balance	\$ -	\$ -	\$ -
Monthly Mortgage Payment	\$ -	\$ -	\$ -

Section 3. Automobiles, Cycles, Recreational Vehicles: (Attach a list if needed)			
Make	Model	Year	Present Value
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
			\$ -

Section 4. Payables, Loans & Other Liabilities Owing (Attach a list if needed)			
Name of the Notes/Debt Holder(s)	Current Balance	Mo. Payment	Security/Collateral
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	
	\$ -	\$ -	

Personal Information: Please answer

Are any assets pledged or restricted other than indicated on the liability section?

Are you a defendant in any legal actions or law suits? If so, describe.

Are you a partner or officer in any other venture? If so, describe.

Do you have Health Insurance?

Have you ever declared bankruptcy? If so, describe.

Income Taxes settled through? Date:

The undersigned certifies that the preceding information has been supplied truthfully, accurately, and voluntarily, and therefore authorize Co-op Credit Union to investigate our creditworthiness, credit history, and financial responsibility through any credit bureau or by any reasonable means. If this application is for the purpose of encumbering real property, the undersigned agrees to pay all allowable expenses incurred in processing this application whether or not the loan is approved. This application does not constitute a contract for extension of credit. The undersigned understands that it may be a Federal crime punishable by fine or imprisonment or both to knowingly make any false statements concerning any of the above facts, as applicable under the provisions of Title 18, United State Code, Section 1014

Co-op Credit Union: Debtor acknowledged receipt of an exact copy of the Application/Financial Statement

Witness: Signature of Applicant

Signature of Co-Applicant/Spouse

COMPLETE THIS SECTION ONLY IF YOU ARE MARRIED AND YOU ARE APPLYING FOR INDIVIDUAL CREDIT

I certify that the credit being applied for, if granted, will be incurred or obtained during marriage and will be in the interest of the marriage or family. This statement is made in accordance with Wis. Stat. Sec. 766.55 (1).

Signature of Applicant Date:

IF THIS SECTION APPLIES, WE ARE REQUIRED BY WISCONSIN LAW TO NOTIFY YOUR SPOUSE BY MAIL IF YOU ARE GRANTED CREDIT