## CONFIDENTIAL WIDGET FINANCIAL

Please leave no blank spaces. Insert the word "none" in absence of any amount. Furnished as of I/We understand that the credit union designated above me/us, I/we will immediately and without delay give written ("Widget Federal Credit Union, DBA Widget Financial") will notice to the Credit Union. In absence of written notice to the rely on all the information herein in determining whether or contrary received by the credit union from me/us, this not to extend me/us credit from time to time. I/We warrant the Personal Financial Statement shall be deemed to constitute a following to be a true and accurate statement of my/our continuing warranty that there have been no material changes financial condition as of the above date. I/We further agree in such financial condition. Note: Providing false information that if any change occurs which would materially lessen is a felony under Federal law. my/our means or ability to pay all claims or demands against Personal Information – Applicant Personal Information – Co-Applicant Name Name Date of Birth Date of Birth Social Security Number Social Security Number Present Address (number and street) Present Address (number and street) City State Zip Code City State Zip Code Home Phone **Business Phone** Home Phone **Business Phone** Business/Occupation Business/Occupation Employer Position Employer Position Number of Years Number of Years Partner or Officer in any other Venture Partner or Officer in any other Venture Number of Dependents (including Applicant) Number of Dependents (including Applicant) Additional Information – Applicant/Co-Applicant If you answer yes to any of the following questions, please detail below. Applicant Co-Applicant  $\square$  Yes  $\square$  No ☐ Yes ☐ No Are any assets pledged? If yes, indicate on schedule A through G on following pages. ☐ Yes ☐ No ☐ Yes ☐ No 2. Are there any unsatisfied judgments or legal claims against you? ☐ Yes ☐ No ☐ Yes ☐ No Have you ever been through bankruptcy or made settlement with creditors? **Contingent Assets** ☐ Yes ☐ No ☐ Yes ☐ No Do you have a vested pension or other deferred compensation? ☐ Yes ☐ No Do you have earned, but unpaid commissions? ☐ Yes ☐ No **Contingent Liabilities** ☐ Yes ☐ No ☐ Yes ☐ No Are you an endorser, co-maker, or guarantor for another party? ☐ Yes ☐ No ☐ Yes ☐ No Are you obligated on leases or contracts? 7. ☐ Yes ☐ No ☐ Yes ☐ No 8. Are you obligated for any federal income tax claim?  $\square$  Yes  $\square$  No ☐ Yes ☐ No Other Contingencies Detail – Applicant Detail – Co-Applicant Please specify above question number(s) Please specify above question number(s)

Assets		Schedule	Amount	Liabilities		Schedule	Amount
Cash on Hand an	d in Financial Institution	A	\$	Notes Payable to	Bank - Secured	H	\$ \$
J.S. Governmen	t Securities	В	\$	Notes Payable to	Bank - Unsecure	d H	\$
Listed Securities		В	\$	Notes Payable to Institutions – Se	o other Financial	Н	\$
Un-listed Securities		В	\$		o other Financial		Ψ
Accounts and Notes Receivable Due From Relatives and Friends		С	\$	Institutions - Un		Н	\$
accounts and No	otes Receivable			Notes Payable to	Relatives and Fri	ends H	\$
Due From Others		С	\$	Notes Payable to	Others	Н	\$
Real Estate Residence (Cost)		D	\$ Accounts and Bills Payable		ills Payable	Н	\$
ther Real Estate	e (Cost)	D	\$	<u>Life Insurance I</u>	oans	E	\$
Real Estate Mortgages Receivable		С	\$	Income Tax and Penalties Payable			\$
ash Surrender V	Value, Life Insurance	Е	\$	Other Taxes and	Penalties Payable	3	\$
imited Partnersl	hip Investments (Cost)	F	\$	Real Estate Mor	tgages Payable	D	\$
Ownership in Pri	ivate Companies	G	\$	Other Debts (Ite	mize)		\$
ersonal Property	y		\$				
automobiles			\$				
Other Assets (Ite	mize)		\$				
				T-4-1 T (-1-11/4)			
				Total Liabilities			\$
				Net Worth			\$
Γotal Assets			\$	Net Worth			\$
Fotal Assets				Net Worth			\$
			\$	Net Worth  Total Liabilitie			\$
Schedule A	– Cash on Hand	and in Fir	\$	Net Worth  Total Liabilitie	s and Net Worth		\$
Schedule A	– Cash on Hand	and in Fir	\$ ancial Institution	Net Worth  Total Liabilitie	s and Net Worth		\$
Schedule A	– Cash on Hand	and in Fir	\$ ancial Institution	Net Worth  Total Liabilitie	s and Net Worth		\$
Schedule A	– Cash on Hand	and in Fir	\$ ancial Institution	Net Worth  Total Liabilitie	s and Net Worth		\$
Schedule A	– Cash on Hand	and in Fir	\$ ancial Institution	Net Worth  Total Liabilitie	s and Net Worth		\$
Schedule A Financial Instit	Cash on Hand ution Account	and in Fir	stancial Institutions Type and Matu	Net Worth  Total Liabilitie  S  Bala	s and Net Worth	Pledged to Whom	\$ \$
Schedule A Financial Instit	Cash on Hand ution Account	and in Fir	sancial Institution: Type and Matu	Net Worth  Total Liabilitie  S  Bala	s and Net Worth	Pledged to Whom	\$ \$
Schedule A Financial Instit	Cash on Hand ution Account	and in Fir	stancial Institutions Type and Matu	Net Worth  Total Liabilitie  S  Bala	s and Net Worth	Pledged to Whom	\$ \$
Schedule A Financial Instit	Cash on Hand ution Account	and in Fir	stancial Institutions Type and Matu	Net Worth  Total Liabilitie  S  Bala	s and Net Worth	Pledged to Whom	\$
Schedule A Financial Instit	Cash on Hand ution Account	and in Fir	stancial Institutions Type and Matu	Net Worth  Total Liabilitie  S  Bala	s and Net Worth	Pledged to Whom	\$ \$
Schedule A Financial Instit  Schedule B Financial Instit	Cash on Hand ution Account	and in Fir	stancial Institutions Type and Matu	Net Worth  Total Liabilitie  S  Bala	s and Net Worth	Pledged to Whom	\$ \$
Schedule A Sinancial Instit Schedule B Same of Secur	Cash on Hand ution Account	and in Fir	s  ancial Institution  Type and Matu          e sheet if necessa  umber of Share/Bonds	Net Worth  Total Liabilitie  S  Bala  I  I  I  I  I  I  I  I  I  I  I  I  I	s and Net Worth	Pledged to Whom	\$ \$ Pledged to Whom
Schedule A Sinancial Instit Schedule B Same of Secur	Cash on Hand ution Account	and in Fir	s  ancial Institution  Type and Matu          e sheet if necessa  umber of Share/Bonds	Net Worth  Total Liabilitie  S  Bala  I  I  I  I  I  I  I  I  I  I  I  I  I	Market Va	Pledged to Whom	\$ \$
Schedule A Financial Instit  Schedule B Name of Secur	Cash on Hand ution Account	and in Fir	s  ancial Institution  Type and Matu          e sheet if necessa  umber of Share/Bonds	Net Worth  Total Liabilitie  S  Bala  I  I  I  I  I  I  I  I  I  I  I  I  I	Market Va	Pledged to Whom	\$ \$ Pledged to Whom
Schedule A Financial Instit  Schedule B Name of Secur	Cash on Hand ution Account	and in Fir	s  ancial Institution  Type and Matu          e sheet if necessa  umber of Share/Bonds	Net Worth  Total Liabilitie  S  Bala  I  I  I  I  I  I  I  I  I  I  I  I  I	Market Va	Pledged to Whom	\$ \$ Pledged to Whom

Schedule D – Real	Estate								
Location and Description	Title	Date Acq	uired	Cost		Market Val	ue	Insurer of Insu	and Amount arance
1.									
2.									
3.									
4.		I							
Mortgages Mortgagee	Amount	Current E	Ralanca	Maturity		Amount of	Dayment	Lagga	Rental Income
Mortgagee	Amount	Current	Salalice	Maturity		Amount of	rayment	Lease	Kentai income
1.									
2.									
3.									
4.									
Schedule E – Life I	nsurance								
Face Amount	Issuing Company	7	Policy (	Owner(s)	Insured	(	Cash Surrender	· Value	CSV Loans
	15	_							
Schedule F – Limite Name of Partnership	Title and Type of			wnership	Original I	Investment	Annual Ca	shflow	Letter of Credit or Note Due
	I		ı		I		ı		I
			İ		İ				I
Schedule G – Owne						** 1		0/ 0/	
Name and Nature of Business	Title	% of Ow	nership	\$ Value		Value A	Approach		ime Devoted to any (if any)
Schedule H – Notes		nal Amount	Paymen	t Tamas		Current Bal	omas Dus	e Date	Conveity
10 Wnom From V	wnom Ongn	nai Amount	Paymen	it Terms		Current Bai	ance Due	e Date	Security
Credit References Please list other Financial	Institutions which	you previous	ly have h	ad or curre	ntly have a	accounts.			
Name of Financial Institution	1			Location					
Name of Financial Institution	1			Location					
Name of Financial Institution	ı			Location					

Income Statement Income from alimony, child support, or sep	e	Applicant:									
payments need not be revealed if you do no income in applying for credit. If you are re		Court C	Order	☐ Written Agr	greement						
from alimony, child support, or separate man			Co-App	licant:							
by:		Court C									
Annual Income	Annual Income Current Year				Next year Projection						
Please complete or attach the most recent Federal	Fiscal Year Ended			20	Fiscal Year End	, 20					
Income Tax returns of Applicant and Co-Applicant. Complete "Projected" column for the next year.	Applicant	Co-Applicar			Applicant	Co-Applicant					
Salaries	\$	\$			\$	\$					
Bonuses and Commissions	\$	\$			\$	<u>\$</u>					
Dividends	\$\$	<u>\$</u> \$			\$	\$\$					
Interest	\$	\$			\$	\$\$					
Capital Gains	\$	<u>\$</u> \$			\$	\$\$					
Rents and Royalties	\$\$	\$			\$	\$\$					
Partnership Distributions	\$\$	\$\$			\$	\$\$					
Business Income	\$\$	\$\$			\$	\$\$					
Other	\$\$	\$\$			\$	\$\$					
Total	\$\$	\$			\$	\$\$					
Annual Expenses	Current Year				Next year I	Projection					
1	Applicant	Co-Applicar	nt		Applicant	Co-Applicant					
Income Taxes	\$	\$			\$	\$					
Other Tax Assessments	\$\$	<u>\$</u>			\$	\$\$					
Interest	\$\$	<u>\$</u>			\$	\$\$					
Payment on Mortgages	\$	<u>\$</u> \$			\$	\$\$					
Contracts	\$\$	<u>\$</u>			\$	\$\$					
Installment Debts	\$\$	\$			\$	\$\$					
Real Estate Maintenance	\$	<u>\$</u> \$			\$	\$\$					
Personal Living Expenses	\$	<u>\$</u> \$			\$	\$\$					
Other	\$	<u>\$</u> \$			\$	\$\$					
Total	<u>\$</u> \$	\$			\$	\$					
Authorization to Check Credit and	Financial Statu	10									
The undersigned hereby authorizes the Credit Union, and any bureau or agency employed by the Credit Union, to make whatever credit inquiries it deems necessary, including but not limited to checking and verifying the undersigned's employment history and credit history, in connection with the undersigned's personal statement or in the course of review or collection of any credit extended or maintained in reliance of this statement.			The undersigned authorizes the Credit Union to answer the question about the Credit Union's credit experience with the undersigned, unless prohibited by law. The undersigned authorizes and instructs any person or credit reporting agency to compile and furnish to the Credit Union any information it may have or obtain in response to the credit inquiries authorized herein.								
Signature		Т	Date								
X		1									
Signature X		Ι	Date								
Optional Data (This information is 1	equested but n	ot required	d.)								
	1			pplicar	nt	Co-Applicant					
Do you have a will? (If yes, who is the executor	?)			Yes	$\square$ No	$\square$ Yes $\square$ No					