



PERSONAL FINANCIAL STATEMENT

APPLICANT: (A)

Name _____

Address _____

City _____ State WI Zip _____

Social Security # _____ DOB _____

SPOUSE: (B)

Name _____

Address _____

City _____ State WI Zip _____

Social Security # _____ DOB _____

Please complete for both applicant (A) and spouse (B).
If applicants are married, both individuals must sign and date this Personal Financial Statement.

Single Married Divorced Widowed

1) Assets (What you own)		✓A	✓B
Checking Accounts	\$ -		
Savings Accounts	\$ -		
Money Market Funds	\$ -		
Life Insurance Face Value	\$ -		
Cash Surrender Value	\$ -		
401k / 403(b)	\$ -		
CD's	\$ -		
IRA's	\$ -		
Notes Receivable	\$ -		
	\$ -		
Total Invested Assets	\$ -		

2) Other Assets		✓A	✓B
Fair Market Value Residence	\$ -		
Other Real Estate Owned	\$ -		
Automobile(1)	\$ -		
Year/Make _____			
Automobile (2)	\$ -		
Year/Make _____			
Personal Property	\$ -		
	\$ -		
	\$ -		
	\$ -		
Total Other Assets	\$ -		

Total Assets (1+2)	
	\$ -

2) Liabilities (What you owe)		✓A	✓B
Balance of Mortgage on Residence Loan with _____	\$ -		
Does your payment include property taxes? Yes ___ No ___			
Second Mortgage Loan with _____	\$ -		
Auto Loan(s) Loan with _____	\$ -		
Student Loan(s)	\$ -		
Credit Card(s)	\$ -		
Other Debt	\$ -		
Other Debt	\$ -		

Total Liabilities	
	\$ -

Total Net Worth	
Total Assets (1+2) - Total Liabilities(3)	\$ -

Signatures
I/WE acknowledge this information will be relied upon by WWBIC. I/WE acknowledge that this is a reasonable representation of all assets and liabilities, and that it contains no deliberate or material misrepresentations. I/WE understand this information may be verified.

X _____ Date _____

X _____ Date _____

Monthly Household Budget		✓A	✓B
Sources of Income			
Monthly Salary	\$ -		
Other Income _____	\$ -		
Child Support	\$ -		
Expenses			
Rent/Mortgage	\$ -		
Utilities	\$ -		
Auto	\$ -		
Installment Loan(s)	\$ -		
Miscellaneous	\$ -		
Food	\$ -		
Clothing	\$ -		
Total Expenses	\$ -		