

Highmark Federal Credit Union  
 725 5th Street  
 Rapid City, SD 57701  
 (605) 716-4444



**Personal Financial Statement**

**As of:**

Name	Business Phone
Residence Address	Residence Phone
City, State, & Zip Code	
Business Name of Applicant/Borrower(s)	

Assets	Liabilities
Cash on hand & in Banks ..... \$	Accounts Payable ..... \$
Savings Accounts ..... \$	Notes Payable to Banks & Others
IRA or Other Retirement Account ..... \$	(Describe in Section 2) ..... \$
Accounts & Notes Receivable ..... \$	Installment Account (Auto) ..... \$
Life Insurance-Cash Surrender Value Only	Mo. Payments \$ _____
(Complete Section 8) ..... \$	Installment Account (Other) ..... \$
Stocks & Bonds	Mo. Payments \$ _____
(Describe in Section 3) ..... \$	Loan on Life Insurance ..... \$
Real Estate	Mortgages on Real Estate
(Describe in Section 4) ..... \$	(Describe in Section 4) ..... \$
Automobile-Present Value ..... \$	Unpaid Taxes
Other Personal Property	(Describe in Section 6) ..... \$
(Describe in Section 5) ..... \$	Other Liabilities
Other Assets	(Describe in Section 7) ..... \$
(Describe in Section 5) ..... \$	Total Liabilities ..... \$
<b>Total</b> \$	Net Worth ..... \$
	<b>Total</b> \$

Section 1. Source of Income	Contingent Liabilities
Salary ..... \$	As Endorser or Co-Maker ..... \$
Net Investment Income ..... \$	Legal Claims & Judgments ..... \$
Real Estate Income ..... \$	Provision for Federal Income Tax ..... \$
Other Income (Describe below)* ..... \$	Other Special Debt ..... \$

Description of Other Income in Section 1.


\*Alimony or child support payments need not be disclosed in "Other Income" unless it is desired to have such payments counted toward total income.

**Section 2. Notes Payable to Banks and Others** (Use attachments if necessary. Each attachment must be identified as part of this statement and signed.)

Name and Address of Noteholder(s)	Original Balance	Current Balance	Payment Amount	Frequency (monthly, etc)	How Secured or Endorsed Type of Collateral
	\$	\$	\$		
	\$	\$	\$		
	\$	\$	\$		
	\$	\$	\$		
	\$	\$	\$		

**Section 3. Stocks and Bonds** (Use attachments if necessary. Each attachment must be identified as part of this statement and signed.)

Name of Securities	# of Shares	Cost Per Share	Market Value	Date of Valuation	Total Value
		\$	\$		\$
		\$	\$		\$
		\$	\$		\$
		\$	\$		\$

**Section 4. Real Estate Owned** (Use attachment if necessary. Each attachment must be identified as part of this statement and signed.)

	Property A	Property B	Property C
Type of Property			
Address			
Date Purchased			
Original Cost	\$	\$	\$
Present Market Value	\$	\$	\$
Name & Address of Mortgage Holder			
Mortgage Account Number			
Mortgage Balance	\$	\$	\$
Amount of Payment per Month/Year	\$	\$	\$
Status of Mortgage			

**Section 5. Other Personal Property and Other Assets** (Describe, and if any is pledged as security, state name and address of lienholder, amount of lien, terms of payment and if delinquent, describe delinquency)

**Section 6. Unpaid Taxes** (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.)

**Section 7. Other Liabilities** (Describe in detail.)

**Section 8. Life Insurance Held** (Give face amount and cash surrender value of policies - name of insurance company and beneficiaries.)

I authorize Highmark Federal Credit Union to make inquiries as necessary to verify the accuracy of the statements made and to determine my creditworthiness. I certify the above and the statements contained in the attachments are true and accurate as of the stated date(s). These statements are made for the purpose of maintaining my account or obtaining a new loan. I understand FALSE statements may result in the discontinuation of services to me and/or denial of credit.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

PLEASE NOTE: The estimated average burden hours for the completion of this form is 1.5 hours per response.