



**SOUTH CENTRAL OREGON
ECONOMIC DEVELOPMENT DISTRICT**

PERSONAL FINANCIAL STATEMENT

As of _____

LAST NAME			FIRST	MIDDLE	DATE OF BIRTH	SOCIAL SECURITY NUMBER	
ADDRESS NUMBER AND STREET					CITY, STATE, ZIP		
HOME PHONE	BUSINESS PHONE	AGES OF DEPENDENT CHILDREN		EMPLOYER/SELF-EMPLOYED	NO. OF YEARS	POSITION OR OCCUPATION	

You may apply for credit in your own name alone, regardless of marital status. *Indicate below how you are applying for credit:*

I am applying for credit in my individual name and I am relying on my own income and assets, which are set forth below, and not the income or assets of another person.

I am applying for credit and I am relying on my income and assets, as well as income and/or assets owned jointly by me with another person or another source identified as follows:

We are applying for joint credit, the names of the co-applicants are*: _____

*The spouse of a joint applicant need not sign unless he or she intends to be a co-applicant.

SPOUSE'S NAME	SPOUSE'S EMPLOYER	SALARY OR WAGES PER _____
SOURCE OF OTHER INCOME	SPOUSE SOCIAL SECURITY NUMBER	AMOUNT OF OTHER INCOME PER _____

ASSETS	(Omit cents)
Cash on hand & in Banks	
Savings Accounts	
IRA or Other Retirement Account	
Accounts & Notes Receivable – Schedule A	
Life Insurance-Cash Surrender Value Only	
Stocks and Bonds – Schedule B	
Real Estate – Schedule C	
Automobiles & Trucks -Present Value	
Livestock, crops, farm products	
Other Personal Property	
Other Assets	
Total Assets:	

LIABILITIES	(Omit cents)
Accounts Payable – Schedule D	
Notes Payable to Banks and Others – Schedule E	
Installment Account (Auto) – Schedule F Mo. Payments \$ _____	
Installment Account (Other) – Schedule F Mo. Payments \$ _____	
Loan on Life Insurance	
Mortgages on Real Estate – Schedule C	
Unpaid Taxes	
Other Liabilities	
Total Liabilities:	
Total Net Worth:	
Total Liabilities and Net Worth:	

Schedule A. ACCOUNTS RECEIVABLE			Schedule A. NOTES RECEIVABLE		
Name	Amount	Due Date	Name	Amount	Due Date
TOTAL			TOTAL		

Schedule B. STOCKS AND BONDS		Number of Shares	Market Value per share	Total Market Value	Source of Value
Name of company	Registered Name				
TOTAL					

Schedule C. REAL ESTATE						Mortgages or Contracts		Rental Income
Location, Size, Description	Title in Name of:	Year Acquired	Original Cost	Market Value	Loan Payable to:	Balance	Mo. Pymt.	
TOTAL				TOTAL				

Schedule D. ACCOUNTS PAYABLE			Schedule E. NOTES PAYABLE		
Payable To	Amount	Terms	Payable To	Amount	Terms
TOTAL			TOTAL		

Schedule F. INSTALLMENT OBLIGATIONS				
Payable To	Collateral	Balance	Final Due Date	Mo. Payment
TOTAL			TOTAL	

I/We have provided information in this application truthfully as of the date stated above. The undersigned represents and warrants that there are no other liabilities of any nature whatsoever other than stated hereon and agrees to notify South Central Oregon Economic Development District promptly of any change in the financial condition of the undersigned that in any way adversely affects the financial responsibility of the undersigned.

I/We authorize South Central Oregon Economic Development District to verify or check any of the information given, check credit references, verify employment, and obtain one or more credit reports in connection with this credit application or in connection with any periodic review of any loans or credit which may have been extended to me/us. If I am married and live in a community property state, this authorization is also made on behalf of my spouse even if he or she is not a co-applicant.

Except as otherwise set forth herein, the undersigned further agrees that no listed assets are held in joint tenancy with any person other than the undersigned's spouse and will not be so listed in the future.

I/We give all of my/our creditors permission to give South Central Oregon Economic Development District any information it needs to make a credit granting decision. I/We give South Central Oregon Economic Development District permission to report to credit reporting agencies and others the results of such investigations and South Central Oregon Economic Development District's experience with my/our loan account.

APPLICANT'S SIGNATURE	DATE	SPOUSE'S SIGNATURE*	DATE

***Spouse need not sign unless he or she is a co-applicant.**