Community Development Authority (CDA)

Date of Birth:

PERSONAL FINANCIAL STATEMENT

Applicant Name:

□ Individual Statement □ Joint Statement Information about your spouse does not need to be provided unless this is a joint statement with your spouse or if you are relying on his/her income or assets to obtain credit. All parties whose assets are relied upon will be requested to sign notes or other documents required in connection with credit extended.

Social Security number:

Co-Applicant Name:	Date of Birth:		Social Security numb				
Address:				Home Phone:	Years at a	address:	
Employer Name	Type of Business:		Position:	Years in j	ob:		
Employer Address:				Business Telephone:			
INCOME & EXPENDITURES STATEMENT	unless	•	ch income to b	eparate Maintenance Pa e considered in evalua propriate.	-		
CURRENT YEAR'S ESTIMATED INCOME	APPLICANT	CO- APPLICANT	CURRENT YEAR	R'S ESTIMATED EXPENSES	APPLICANT	Co-Applicant	
Salary & Net Professional Income			Rent, Co-op/Condo Maintenance or Mortgage Payments (Annual)				
Bonus & Commissions			Real Estate				
Interest and Dividends			Income Taxe	es (State & Federal)			
Net Real Estate Income			Interest & Pr	rincipal Payments on			
Capital Gains (Losses)			Estimated Li	ving Expenses			
Other Income – describe			Other Expen	ses – describe			
Total				Total			
PERSONAL BALANCE SHEET		•					
Assets			LIABILITIES				
ERSONAL BALANCE SHEET SSETS ash (Schedule 1)			Consumer D	ebt (Schedule 3)			
Marketable Securities (Schedule 2)			Real Estate I	Mortgage, Personal (So	chedule 4)		
ash (Schedule 1) larketable Securities (Schedule 2) etirement Accounts (Schedule 7)			Real Estate I	Mortgage, Investment	(Schedule 4)		
Real Estate, Personal (Schedule 4)	h (Schedule 1) ketable Securities (Schedule 2) irement Accounts (Schedule 7) I Estate, Personal (Schedule 4)		Loans agains	st life insurance (Sched	dule 5)		
Real Estate, Investment (Schedule 4)		Margin Loan	s (Schedule 2)			
Cash Value Life Insurance (Schedule		Other Liabilit	ties				
Other Assets (Schedule 6)		Contingent L					
Other Investments (Schedule 7)				•	•		
Total Assi	ETS			Тот	AL LIABILITIES		
					NET WORTH		
				(TOTAL ASSETS MINUS TO			

ocnedule 1	Cash in Bank Checking and Savings Accounts, Certificates of Deposit, Name of Bank or Money Market Fund								DEPOSIT BALANCE			PLEDGED AS COLLATERAL		
26														
	SECURITIES Stock and Bonds Registered and Traded on National Exchanges or over the Counter, Treasury Bills, Municipal Bonds, Commercial paper, Mutual Funds – Include Margin Loans with Brokerage Firms													
7	BONDS – FACE VALUE STOCKS – NUMBER OF SHARES			SCRIPTION OF SECURITY C			Cost	COST MARKET VALUE		ANY SECURITIES PLEDGED? IF SO, TO WHOM		IF BROKERA MARGIN LOAN		
	Consumer Debt and Installment Credit (indicate types as auto, credit card, etc.)													
ociledale o	Түре	COL	LATERAL	L					TOTAL MONTHLY PAYMENT			TOTAL OUTSTANDING BALANCE		
5													2121ANDING	
	PERSONAL OR IN		NT REAL EST				gages and		ity lines)	DAN	MATURITY	LENDER		
			PROPERTY	Purchase Date Price			BALANCE		JAN	DATE	LENDER			
	LIFE INSURAN	CE												
	INSURANCE COMPANY			FACE AMOUNT OF POLICY TERM F		E LIFE OF POLICY	BENE	BENEFICIARY			CASH SURRENDER VALUE, IF ANY			

	Отнек Assets (List any items which you fee airplanes, boats, etc.)	el are significant enough t	o note; partnerships,	investments, a	outomobiles	S,
e 6	ASSET	Cost	Market Value	AMO	Amount Due	
Schedule 6						
Sch						
	OTHER INVESTMENTS (IRA's, Keogh's, etc.)					
7	Investment/Custodian	DATE ACQUIRED	MARKET	Market Value		
Schedule 7						
Sche						
•						
	<u> </u>					
					Yes	No
1) Hav	ve either of you or any firm in which you were	e a major owner ever decl	ared bankruptcy?			
	you a guarantor, co-maker, or endorser for a	any debt of an individual,	corporation or			
partne	rship?			\$		
3) Are	there any suits or legal actions pending agai		\$			
4) Inc	ome Taxes are filed through (date):	. Are any returns	currently being audi	ted or conteste	ed?	
5) Do	you have any outstanding letters of credit or	surety bonds?				
unders relying unders unders advers substat be inac guaran deem unders the un-	formation contained in this statement is pro- igned or to others upon the guarantee of the on the information provided herein in decidi- igned represents, warrants and certifies that igned agrees to notify you immediately in we e changes in any of the information containential correct. If the undersigned fails to noti- ccurate or incomplete in any material respec- teed by the undersigned, as the case may be necessary to verify the accuracy of the in- igned. The undersigned authorizes any pers- dersigned. Each of the undersigned. Each of financial statement and any other financial igned also agrees that all funds advanced under-	e undersigned. The undering to grant or continue of the information provided writing of any change in red in this statement, this statement, this sty you as required above to the information contained here on or consumer reporting of the undersigned shall storother information that	rsigned acknowledges redit or to accept a god herein is true, corresponding to the considered or if any of the information and to determine agency to give you act the undersigned give the undersigned gives the undersigned gives accept to accept the undersigned gives the undersigned gives accept to accept the undersigned gives accept to accept the undersigned gives accept to accept the undersigned gives a correct the undersigned gives a correct to accept the accept to accept the accept to accept the accept to accept the accept th	s and understaguarantee there ect and comple inployment and as a continuin indersigned or the orized to make the credit-way information dated financial are shall be you	nds that your conditions that you conditions the indebte conditions on it may has statement.	ou are of the of the aterial nt and ove to edness es you of the ave on . This
Applica	nnt Signature		Date			
Co-Anr	olicant Signature		 Date			