INDIANA Members Credit Union
Keeping It Simple

Confidential Personal Financial Statement

Date of Statement:

Applicant			Co-Applicant		
Name			Name		
Home Address			Home Address		
Email			Email		
Home Ph.	SSN	Date of Birth	Home Ph.	SSN	Date of Birth

Annual Income	Amount(s)	
	Applicant	**Co-Applicant**
Salary		
Bonus / Commission		
Dividend, Interest & Investment Income		
Rental Income		
Business Income (See Schedule D)		
Other Income (list)		
TOTAL INCOME ►	**$**	

Annual Expenditures	Amount(s)
Mortgage/Rent Payments	
Property Taxes	
Principal & Interest Payments	
Insurance	
Alimony/Child Support	
Tuition	
Other Expenses (list)	
TOTAL EXPENDITURES ►	**$**

*Income from alimony, child support, or separate maintenance income need not be revealed if the applicant or co-applicant does not wish to have it considered as a basis for repaying this obligation.

Any significant changes expected in the next 12 months? ☐ Yes ☐ No (If yes, attach information)

Schedule A – Cash on Deposit (Attach separate worksheet if necessary)

Name of Depository	Owner(s)	Account Type	Amount

Schedule B – Stocks and Bonds (Attach separate worksheet if necessary)

No. of Shares (Stocks) Or Face Value (Bonds)	Description	Owner(s)	Where Held	Cost	Current Market Value	Pledged	
						Yes	No

Schedule C – IRA, Keogh, Profit Sharing / SEPs etc. (Attach separate worksheet if necessary)

Description	Owner(s)	Where Held	Current Market Value

Schedule D – Life Insurance (Attach separate worksheet if necessary)

Insurance Company	Face Amount of Policy	Type of Policy	Beneficiary	Cash Surrender Value	Amount Borrowed	Ownership

Schedule E – Partnerships (Attach separate worksheet if necessary)

Name and Location/ Description	Date of Initial Investment	Cost	Percentage Owned	Current Market Value	Monthly Income	Balance Due	Monthly Payment	Maturity Date

***Note:** For investments that represent a material portion of your total assets, please include relevant financial statements, tax returns, partnership investments, S-corporations, schedule K-1, etc.

Schedule F - Personal Residence & Real Estate Investments, Mortgage Debt (Attach separate worksheet if necessary)										
Personal Residence-Property Address	Titled in name of	% Owed	Purchase Year / Price	Market Value	Loan Balance	Interest Rate	Maturity Date	Monthly Payment	Monthly Income	Lender
Investment – Property Address	Titled in name of	% Owed	Purchase Year / Price	Market Value	Loan Balance	Interest Rate	Maturity Date	Monthly Payment	Monthly Income	Lender

Schedule G – Notes and Accounts Payable (Other than Real Estate Debt) (Attach separate worksheet if necessary)				
Owed To	Maturity Date	Balance Due	Monthly Payment	Secured, Cosigned or Guaranteed By

Please Indicate ownership of assets/ liabilities: J=Joint: A=Applicant: C=Co-Applicant

Assets	•	Amount(s)	Liabilities	•	Amount(s)
Cash and Depository Accounts (Schedule A)			Accounts Payable		
Stocks and Bonds (Schedule B)			Life Insurance Loans (Schedule D)		
IRA, Keogh, Profit Sharing / SEPs etc. (Schedule C)			Notes Due: Partnership / Business (Schedule E)		
Deferred Income (number of years deferred)			Residential Mortgage Debt (Schedule F)		
Net Cash Value of Life Insurance (Schedule D)			Comm. / Investment Mortgage Debt (Schedule F)		
Partnerships/ PC Interests (Schedule E)			Vehicle Loans		
Residential Real Estate (Schedule F)			Unsecured Debt (including credit cards)		
Commercial Real Estate (Schedule F)			Margin Accounts		
Accounts and Notes Receivable			Taxes Payable		
Vehicles			Student Loan Debt		
Personal Property			Other Liabilities (List)		
Other Assets (list)					
			TOTAL LIABILITIES		
			NET WORTH		
TOTAL ASSETS ►			**TOTAL LIABILITIES & NET WORTH ►**		

Contingent Liabilities (Liability as guarantor or cosigner for loans of others)		
Description	Current Balance	Monthly Payment

Additional Questions

1. Income tax returns filed through (date): _____ Are any returns currently being audited or contested? ☐ No ☐ Yes If yes, what year(s) _____
2. Are any of your tax obligations past due? ☐ No ☐ Yes Amount $_____
3. Have you or any firm in which you were a major owner ever declared bankruptcy? ☐ No ☐ Yes If yes, please attach explanation.
4. Are there any suits or legal actions pending against you? ☐ No ☐ Yes If yes, please attach explanation.
5. Have you drawn a will? ☐ No ☐ Yes Name of executor(s) and year will was drawn: _____

Date Signed: _____ Applicant Signature: _____

Date Signed: _____ Applicant Signature: _____