



Personal Financial Statement

IMPORTANT NOTE: Please date and sign statement

Applicant Name: _____ **Co-applicant:** _____
Address: _____ **Address:** _____

For Wisconsin Residents only, Please check one one of the following: I am: married unmarried legally separated
Name of Spouse: _____ **Address:** _____

To Fortifi Bank for the purpose of obtaining credit from lender and any future credit granted by Lender, or to support the extension of credit already given, I make the following statement to lender of my financial condition on. This statement is Lender's property.

NOTICE TO MARRIED APPLICANTS: No provision of any marital property agreement, unilateral statement, or court decree adversely affects the interest of the creditor unless the creditor prior to the time the credit is granted or an open-end credit plan is entered into, is furnished a copy of the agreement, statement or decree or has actual knowledge of the adverse provision.

INSTRUCTIONS FOR INFORMATION TO BE PROVIDED BELOW: If married applicants are applying for joint credit, include all assets and all liabilities of both spouses. Both spouses must sign the statement. If a married applicant is applying for separate credit or joint credit with someone other than his or her spouse, include all marital property and all individual property of the applicant spouse but do NOT include individual property of the other spouse.

For purposes of this statement - marital property means assets acquired with my or my spouse's income on or after 1/1/1986; and individual property means property owned (whether in joint or sole name) by me prior to marriage, prior to establishing residence in Wisconsin, or prior to 1/1/1986, however acquired, and property acquired by me by gift or inheritance at any time.

ASSETS		LIABILITIES	
Cash on Hand and in Fin. Inst. (Schedule A)		Notes payable - Sec. Or Unsec. (Sch. E)	
Gov't and Marketable Securities (Sch. B)			
IRA		Life Insurance Loans (Schedule C)	
Homestead and Real Est. Owned (Sch. D)		Due to Brokers	
		Accounts Payable	
Cash Value Life Insurance (Schedule C)		Unpaid Income Taxes	
		Real Est. Mtgs Payable (Schedule D)	\$
Notes and Loans Receivable		Real Estate Taxes	\$
Automobiles		Credit Cards	\$
		Other Debts (Itemize Below)	\$
			\$
			\$
Vested Pension Benefits or Profit Sharing			\$
Other Assets: List Below			\$
			\$
			\$
			\$
Other Personal Property			\$
		Total Liabilities	\$ -
		Assets less Liabilities = Net Worth	\$ -
TOTAL ASSETS	\$ -	TOTAL LIABILITIES and NET WORTH	\$ -

SOURCES OF INCOME FOR YEAR ENDED		CONTINGENT LIABILITIES OF APPLICANT AND SPOUSE	
Salaries & Bonuses	\$	As Endorser, co-Maker, or Guarantor	\$
	\$	On Lease or Contracts	\$
Commissions	\$	Legal Claims	\$
Dividends & Interest	\$	Other (describe)	\$
Real Estate	\$		\$
Other	\$		\$
	\$		\$

PERSONAL INFORMATION: APPLICANT	CO-APPLICANT
Home Telephone:	Home Telephone:
Social Security No.	Social Security No.
Date of Birth:	Date of Birth:
Employer:	Employer:
UNEXPIRED GOVERNMENT PHOTO ID:	
Issuer Name:	Issuer Name:
ID No.	ID No.
Issued Date:	Issued Date:
Expiration Date:	Expiration Date:
State of ID / Country of ID:	State of ID / Country of ID:
Are any assets pledged or restricted other than indicated on the following schedules?	If so, describe.
Are you a defendant in any legal actions or suits?	If so, describe.
Are you a partner or officer in any other venture?	If so, describe.
Do you have a will?	If so, name of Personal Representative

*For Married Wisconsin residents, name each spouse and include the income of each spouse.

**Income from Alimony, Child Support or Separate Maintenance income need not be revealed if you do not wish the Lender to consider this income on determining your credit worthiness.

Schedule A - Cash, Checking Accounts, Savings Accounts & Certificates of Deposit

Type	Name of Financial Institution	Amount	In Name Of:	Pledged Yes/No
Total		\$ -		

Schedule B - U.S. Government, Listed, & Unlisted Securities (List on separate sheet if necessary)

No. of Shares or Face Value (Bonds)	Description	Owner	Market Value	Pledged Yes/No
			\$	
			\$	
			\$	
Total			\$ -	

Schedule C - Life Insurance Carried, include Group

Face Amount	Name of Company	Owner	Beneficiary	Cash Surrender Value	Cash Surrender Loans
Total				\$ -	\$ -

Schedule D - Real Estate Owned

Address & Type of Property	Date Acquired	Owner	Cost	Mkt. Value	Mortgage Amount	Mortgage Maturity
				\$	\$	
				\$	\$	
				\$	\$	
				\$	\$	
				\$	\$	
Total				\$ -	\$ -	

Schedule E - Name of Banks or Other Lenders Where Credit has Been Obtained

Name & Address of Lender	Borrower	Date Made	Due	High Credit	Current Balance	Sec. Or Unsecured
Total					\$ -	

The information contained in this statement is provided for the purpose of obtaining or maintaining credit with you on behalf of the undersigned, or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in your favor. Each undersigned understands that you are relying on the information provided herein (including the designation made at the ownership or property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that you may consider this statement as continuing to be true and correct until a written notice of a change is given to you by the undersigned. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. You are authorized to answer questions about your credit experience with me.

It may be a federal crime punishable by a fine or not more than \$5,000 or imprisonment for not more than two years or both to knowingly make false statements concerning any of the above information, under provisions of Title 18, Unisted States Code, Section 1014.

Signature (applicant) _____ Date: _____

Signature (co-applicant) _____ Date: _____

For married Wisconsin resident, I understand the lender may be required by law to give notice of any credit transaction to my spouse. The credit applied for, if granted, will be incurred in the interest of my marriage or family.

Signature (individual) _____