W. B. A.	127 (9/3/19)	11031
© 2019 Wiscons	sin Bankers Association/Distribut	ed by FIPCO®

INDIVIDUAL FINANCIAL STATEMENT

IMPORTANT: Date and sign statement

(For Wisconsin residents only)

Date of Financial Statement

Name

Address То

("Lender")

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.

For Wisconsin residents only: I am married legally separated Name of spouse Address

eFIPCO

NOTICE TO MARRIED APPLICANTS: No provision of any marital property agreement, unilateral statement under § 766.59, Wis. Stats., or court decree under § 766.70, Wis. Stats., 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 SUPPLIED BELOW:

Individual Credit. If a married applicant is applying for individual credit, complete this statement including all marital property and all individual property of the applicant, but do not include individual property of the non-applicant spouse. Include all liabilities of both spouses. Only the applicant must sign on page 2.

Joint Credit with spouse as joint applicant. If married applicants are applying for joint credit, include all assets and all liabilities of both spouses. Both spouses must sign this statement.

Joint Credit with as joint applicant who is not your spouse. If a married applicant is applying for joint credit with someone other than his or her spouse, each applicant must complete a separate statement as if applying for individual credit, including all marital property and all individual property of the applicant. Do not include any individual property of the non-applicant spouse. Include all liabilities of the applicant and the applicant's spouse. Only the applicant must sign on page 2.

For purposes of this statement:

Marital property means assets acquired with my or my spouse's income on or after 1-1-86; 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 1-1-86, however acquired, and property acquired by me by gift or inheritance at any time.

COMPLETE ALL BLANKS, WRITING "NO" OR "NONE" WHERE NECESSARY

ASSETS	LIABILITIES OF APPLICANT AND SPOUSE
Cash on Hand and in Financial Institutions (Schedule A)	Notes Payable - Lenders/Secured (Schedule E-1)
Gov't Securities (Schedule B-1)	Notes Payable - Lenders/Unsecured (Schedule E-2)
Publicly Traded Securities (Schedule B-2)	Notes Payable Others (Schedule E-3)
Unlisted Securities (Schedule B-3)	Life Insurance Loans (Schedule C)
Notes and Loans Receivable (Schedule F)	Due to Brokers
Homestead and Real Estate Owned (Schedule D)	Accounts Payable
Automobiles	Unpaid Income Taxes
Other Personal Property	Real Estate Mortgage Payable (Schedule D)
Cash Value Life Insurance (Schedule C)	Real Estate Taxes
Securities Held by Brokers in Margin Accts.	Credit Cards
Equity in Partnership	Other Debts (Itemize Below)
Equity in Proprietorship	
Vested Pension Benefits or Profit Sharing	
Other Assets: (Itemize Below)	
	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	

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

**Income from Alimony, Child Support or Separate Maintenance income and income from medical insurance, disability or wage continuation insurance need not be revealed if you do not wish the Lender to consider this income on determining your creditworthiness.

PERSONAL INFORMATION			
Home Telephone	Social Security No.	Date of Birth	
Employer(s) of Applicant(s)			
Are any assets pledged or restricted	other than indicated on the following schedules? If so, describ	be.	
Are you a defendant in any legal action	ons or suits? If so, describe.		
Are you a partner or officer in any oth	er venture? If so, describe.		
Do you have a will? Yes No If s	so, name of Personal Representative		
Have you ever been declared Bankru	pt? If so, describe.		
Driver's License (or State ID Card	Name, No., State and Expiration Date		
Changed Name on Driver's License of	r State ID Card in Past 5 Years 🗌 No 🗌 Yes, and give Prior	r Name	

No Yes, and give Prior Name

COMPLETE SCHEDULES ON PAGES 2, 3 AND 4 AND SIGN ON PAGE 4

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

Туре	Name of Financial Institution	Amount	In Name Of:	PLED YES	

Schedule B-1 - U.S. Government Securities

No. of Shares or Face Value (Of Bonds)	Description*	Owner	Market Value	PLEC YES	

*Indicates if Securities are Restricted By Contract or SEC Regulations.

Schedule B-2 - Publicly Traded Securities

No. of Shares or Face Value (Of Bonds)	Description*	Owner	Market Value	PLEC YES	

*Indicates if Securities are Restricted By Contract or SEC Regulations.

Schedule B-3 - Unlisted Securities

No. of Shares or Face Value (Of Bonds)	Description*	Owner	Market Value	PLEC	
Value (Of Bonds)				YES	NO

*Indicates if Securities are Restricted By Contract or SEC Regulations.

Schedule C - Life Insurance Carried, Include Group

Face Amount	Name of Company	Owner	Beneficiary	CASH SU Value	RRENDER Loans

Schedule D - Real Estate Owned

Address & Type of Property	Date Acquired	Owner	Cost	Mkt. Value	M Amount	NORTGAGE Monthly \$	Maturity	Insurance

Schedule E-1 - Notes Payable - Lenders/Secured

Name & Address of Lender	Borrower	Date Made	Monthly Payment	Due	High Credit	Current Balance

Schedule E-2 - Notes Payable - Lenders/Unsecured

Name & Address of Lender	Borrower	Date Made	Monthly Payment	Due	High Credit	Current Balance

Schedule E-3 - Notes Payable - Others

Name & Address of Lender	Borrower	Date Made	Monthly Payment	Due	High Credit	Current Balance

Schedule F - Notes and Loans Receivable

Unpaid Amount	Name of Maker	Date Made	Security Pledged

NOTICE: We may report information about your account to credit bureaus. Late payments, missed payments, or other defaults on your account may be reflected in your credit report.

I certify that this financial statement is true and complete. I authorize Lender or its agents to verify the information obtained in this statement and to obtain additional information concerning my financial condition, including, without limitation, consumer credit reports, although Lender may rely on this financial statement without any further verification. I authorize Lender to furnish such information and any other credit experiences with me to others and to answer any questions about my credit experience and other financial relationships with Lender, to the extent not prohibited by applicable law. I agree to notify Lender, in writing, of any change that materially affects the accuracy of this statement.

It may be a crime punishable by a fine or imprisonment or both to knowingly make false statements concerning any of the above information, under provisions of applicable federal and state law.

X

(Date Signed)

X	
	Applicant Signature
X	
	Joint Applicant Spouse Signature (joint credit only)

For married Wisconsin resident. I understand 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.

Applicant Signature