

## INDIVIDUAL FINANCIAL STATEMENT

To: American Airlines Federal Credit Union

Member Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

### CHECK AS APPLICABLE

Applicant is applying for this loan:

- Individually, without a co-signer or guaranty of a person or other legal entity.
- Jointly, with the co-signature or guaranty of one or more persons or legal entities (including existing guarantors).

### NAMES OF OTHER PERSON(S) OR LEGAL ENTITY(IES):

If applicant resides in a community property state, please complete the following concerning marital status:

Applicant is:  married  separated  unmarried (includes single, divorced and widowed)

Co-Applicant, if any, is:  married  separated  unmarried (includes single, divorced and widowed)

Social Security Number	Driver's License Number	Visa or Mastercard No.		Home Phone
Occupation	Name of Employer	No. of Years	Salary \$ per	Business Phone
Amount of alimony, child support and separate maintenance payment income. NOTE: Alimony, child support or separate maintenance payment income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation. \$				
Name and address of payer of any alimony, child support or separate maintenance payment income disclosed above as a source of repayment: Alimony, child support, or separate maintenance received under: <input type="checkbox"/> court order <input type="checkbox"/> written agreement <input type="checkbox"/> oral agreement <input type="checkbox"/> Other:				
Income (salary, social security, dividend, interest, etc.) source: \$ per month				
Have you borrowed from any other branch of this Credit Union?		Branch name:		Date:
Number of dependents:		Ages:		
Have you established a trust? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, is it: <input type="checkbox"/> Revocable <input type="checkbox"/> Irrevocable		Name(s) of Trustee(s):	
Have you made a will? <input type="checkbox"/> Yes <input type="checkbox"/> No	Name of Personal Representative:			
Have you guaranteed or endorsed the notes and/or loans of any other person? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Do you have any other contingent liabilities? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Have any actions or suits been filed against you or are there any recorded judgments or decree entered against you or have you been adjudged bankrupt in the last seven (7) years or made any assignments for the benefit of creditors? <input type="checkbox"/> Yes <input type="checkbox"/> No				
If yes, please explain:				
Name of reference		Address/Phone number		



## INDIVIDUAL FINANCIAL STATEMENT

Please indicate or provide an explanation as to any assets owned jointly or by a trust or liabilities owed to others. Attach schedules and explanatory notes if necessary.

Statement of financial condition of \_\_\_\_\_ as of \_\_\_\_\_ 20\_\_\_\_

Assets		Amount	Liabilities		Amount
Cash	<b>SCHEDULE A</b> In this Credit Union		Notes & Loans (No Real Estate)	<b>SCHEDULE G</b> Notes Payable to Credit Unions	
	Other Credit Unions or Banks			Notes & Loans Payable to Others	
Stocks & Bonds	<b>SCHEDULE B</b> Marketable Securities		Insurance Loans	<b>SCHEDULE C</b>	
	Others		Taxes Due	Taxes Payable	
Tax	Tax Refund Due		Accounts & Bills Payable	<b>SCHEDULE H</b> Credit Card Accounts	
Insurance	<b>SCHEDULE C</b> Cash Value			Open & Revolving Accounts	
Notes Receivable	<b>SCHEDULE D</b> Accounts & Notes Receivable		Other		
Real Estate	<b>SCHEDULE E</b> Residence(s)		Real Estate Notes & Contracts Payable	<b>SCHEDULE E</b> Residence(s)	
	Unimproved Land			Unimproved Land	
	Income Properties			Income Properties	
	Other Real Estate			Other Real Estate	
Other Assets	<b>SCHEDULE F</b> Other Assets & Personal Property		Other Liabilities	<b>SCHEDULE I</b> Other Liabilities	
<b>TOTAL ASSETS</b>		<b>\$</b>	<b>TOTAL LIABILITIES</b>		<b>\$</b>
			(Difference between total assets and total liability)		<b>NET WORTH \$</b>

## RE-CAP OF INCOME AND EXPENSES

\*See Notice below before completing other income

Annual Income for Year 20 <input type="text"/>		Annual Expenses for Year 20 <input type="text"/>		Contingent Liabilities	
Salary or Wages		Property Taxes & Assessments		As Endorser on Notes/Contracts	
Dividends and/or Interest		Federal & State Income Taxes		As Guarantor on Notes/Contracts	
Rentals (Gross Income)		Real Estate Loan Payments		For Taxes	
Business (Net Income)		Contract/Note Payments		Other Contingent Liabilities	
Other Income (Describe)		Living Expenses (Estimated)			
		Other Expenses			
Total Income	\$	Total Expenses	\$	Total Contingent Liabilities	\$

\*Alimony, child support or separate maintenance payment income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.

Schedule A			Cash Location and Status of Credit Union and Other Accounts						
Ckng	Sav.	CD's	Credit Union and Branch Where Carried	Balance	Interest Rate	CD Maturity Date	Is Account Pledged for a loan?	Balance of Loan	Maturity Date of Loan

## INDIVIDUAL FINANCIAL STATEMENT

Total			Total	
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Schedule B		Stocks and Bonds ( Includes Interests In Any Closely Held Business)					
Description	Number of Shares	Registration Number	Source of Valuation	Date	Price Per Share	Total Value	Purchased on Margin or Pledged
Total							

Schedule C		Life Insurance				
Insured	Primary Beneficiary	Face Amount	Cash Value	Loans on Policy	Name of Company	Location of Office
Total						

Schedule D		Accounts and Notes Receivable					
Owner(s)	Due Form	Address	Collateral	Maturity Due	How Payable? Amount Per	Balance Due	
Total						Total	

Schedule E: Real Estate is on page 4 of this form.

Schedule F		Other Assets on Personal Property							
Automobiles		Value	Rec. Vehicles and Boats		Value	Personal Property	Value	Subtotal for	Subtotal
Year	Make		Year	Make		Furniture		Automobiles	\$
						Jewelry		RVs/Boats	\$
						Equipment		Personal Property	\$
						Other:		Total for Other Assets	\$
						Other:			
Subtotal Automobiles		\$	Subtotal RV's/Boats		\$	Subtotal Pers. Prop.	\$		

## INDIVIDUAL FINANCIAL STATEMENT

Schedule G		Notes and Loans Payable to Credit Unions and Others					
Payable To	Address	Collateral	Person(s) Liable	Maturity Date	How Payable?		Balance Due
					Amount	Per	
Total						Total	

Schedule H		Accounts and Bills Payable (Including Credit Cards)			
Payable To	Account Number	Person(s) Liable	How Payable?		Balance Due
			Amount	Per	
Total				Total	

Schedule I		Other Liabilities			
Payable To	Collateral	Person(s) Liable	How Payable?		Balance Due
			Amount	Per	
Total				Total	



## INDIVIDUAL FINANCIAL STATEMENT

I (we) hereby affirm that the foregoing information contained in this financial statement is presented for the purpose of obtaining credit as of the date indicated and is true, complete and correct. I understand the Credit Union is relying on this statement of my financial condition in making loan(s) to me. The Credit Union or its designee is authorized to make any investigation of my credit or employment status either directly or through any agency employed by the Credit Union for that purpose now and in the future. The Credit Union may disclose to any other interested parties the Credit Union's experience with this account. I agree to inform the Credit Union immediately of any matter which will cause any material change to my financial condition. I understand that the Credit Union will retain this financial statement whether or not credit is granted.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Consent (If you are relying on income from a person who is not an applicant above, please have that person complete this section so we can verify their credit.)**

I authorize the Credit Union to make any investigation of my credit either directly or through any agency employed by Credit Union for that purpose in connection with credit application now and in the future.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Social Security Number: \_\_\_\_\_