Corporate Banking/Private Banking

Personal Financial Statement

Reset Form

DollarBank®

Date: _____

PLEASE READ BEFORE COMPLETING

The purpose of this Personal Financial Statement ("Statement") is for each Applicant to obtain or maintain credit. By submitting this Statement, each Applicant understands that Dollar Bank, Federal Savings Bank (the "Bank") is relying on the information provided herein (including without limitation the designation made as to ownership of property) in deciding to grant or continue credit and each Applicant represents and warrants that the information provided is true and complete and gives the Bank an accurate accounting of the Applicant's personal financial condition as of the above date. The Bank may consider this Statement as continuing to be true and complete until a written notice of a change is given to Bank by an Applicant. Further, by submitting this Statement, each Applicant authorizes the Bank to make all inquiries it deems necessary to verify the accuracy of the information contained herein and to determine the Applicant's creditworthiness, including without limitation, obtaining consumer reports and each Applicant authorizes the Bank to answer questions about the Applicant's credit history with the Bank.

Applicant Information

Name of Applicant:		Co-Applicant:	
Home Address: City, State, ZIP:		Home Address: City, State, ZIP:	
SSN:	DOB:	SSN:	DOB:
Employer:	No. of Years:	Employer:	No. of Years:
Title:	Cell Ph:	Title:	Cell Ph:
Home Ph:	Work Ph:	Home Ph:	Work Ph:
Email:		Email:	

IMPORTANT

INSTRUCTIONS: 1) Complete the schedules on page 3 through 5 first. The total from those schedules will automatically populate in the below Assets and Liabilities section. 2) Total assets should equal total liabilities plus net worth.

Assets		Liabilities	
Cash (Schedule 1)	$0	Margin Loans (Schedule 2)	$0
Marketable Securities (Schedule 2)	$0	Consumer Debt (Schedule 4)	$0
Non-Marketable Securities (Schedule 3)	$0	Mortgages on Personal Real Estate (Schedule 5)	$0
Real Estate Personal Use (Schedule 5)	$0	Mortgages on Investment Real Estate (Schedule 6)	$0
Real Estate Investments (Schedule 6)	$0	Loans Against Life Insurance (Schedule 7)	$0
Cash Value Life Insurance (Schedule 7)	$0	Accounts/Notes/Taxes Payable (Schedule 10)	$0
Privately Owned Businesses (Schedule 8)	$0	Other Liabilities (Schedule 11)	$0
Accounts/Notes Receivable (Schedule 9)	$0	**Total Liabilities**	$0
Personal Effects (Schedule 12)	$0		
Other Assets (Schedule 13)	$0	Net Worth (Total Assets - Total Liabilities)	$0
Total Assets	**$0**	**Total Liabilities & Net Worth**	**$0**
Contingent or Deferred Assets (Schedule 14)	$0	Contingent Liabilities	$0

Contingent Liabilities	Yes	No	Amount
Are you a guarantor, co-maker or endorser for any debt of an individual, corporation or partnership? ***(If yes, enter the amount)***			
Do you have any outstanding letters of credit or surety bonds? ***(If yes, enter the amount)***			
Are you contingently liable on any lease or contract? ***(If yes, enter the amount)***			
Total			**$0**

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Additional Personal Information	Yes	No	Years/Date
Are there any suits or legal actions pending against you?			
Are any of your tax obligations past due?			
Are any returns being audited or contested? *(If yes, what years?)*			
Income tax returns filed through *(date)*:			
Have (either of) you or any firm in which you were a principal owner ever declared bankruptcy?			

Salary (Applicant)		**Other Income**		*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 repayment.
Salary (Co-Applicant)		**Other Income**		
Mortgage/Rent Payment		**Alimony/Child Support***		

By signing below, each Applicant intends this Personal Financial Statement to be an application to obtain or maintain credit on behalf of the Applicant and, if there is more than one Applicant, each Applicant intends to apply for joint credit.

Applicant Signature **Date** **Co-Applicant Signature** **Date**

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Fill in all schedules which follow before completing the balance sheet above. When there is nothing to report, indicate "none" on the schedule and "O" on the balance. sheet form. Only those totals from the schedule with the heavy border should be included in the balance sheet on page 1.

Details relative to Assets and Liabilities: If space is insufficient, attach a supplemental list.

Schedule 1 (Cash in Bank: Checking and Savings Accounts, Certificates of Deposit, Money Market Funds)

Name of Bank/Money Market Fund	Owner	Type of Account	Balance	Account Number
			$0	

Schedule 2 (Marketable Securities: Stocks, Bonds, Treasuries, Municipals, Mutual Funds, Annuities, etc.)

No. of Shares / Face Value	Description	Owner	Cost	Market Value	Pledged	Brokerage / Margin Loans
					0%	
					0%	
					0%	
					0%	
Total			$0	$0		$0

Schedule 3 (Non-Marketable Securities: i.e. Oil and Gas Partnerships, Unlisted/Restricted Stocks. Do not include privately owned businesses.)

No. of Shares / Face Value	Description	Owner	Where Held	Cost	Book Value	Est. Market Value
Total				$0	$0	$0

Schedule 4 (Consumer Credit Debt: Installment Debt, Auto Loans, Credit Cards, Charge Accounts, etc.)

Creditor	Name of Borrower	Monthly Payments	Balance Outstanding
Total		$0	$0

Schedule 5 (Real Estate: For Personal Use - Include Second Mortage, if any.)

Property Address	Legal Owner	Purchase Date	Purchase Price	Market Value	Present Balance	Monthly Payments	Original Amount	Maturity Date	Lender
Total			$0	$0	$0	$0	$0		

Schedule 6 (Real Estate: For Investment - Include Second Mortgage, if any.)

Property Address	Legal Owner	Purchase Date	Purchase Price	Market Value	Present Balance	Monthly Payments	Original Amount	Maturity Date	Lender
Total			$0	$0	$0	$0	$0		

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Details relative to Assets and Liabilities: If space is insufficient, attach a supplemental list.

Schedule 7 (Life Insurance - Indicate Type: Whole Life, Term Life, Group Term Life, and Other)

Insurance Company	Type of Policy	Face Value	Annual Premium	Owner	Beneficiary	Cash Value	Amount Borrowed
Total		$0	$0			$0	$0

Disability Insurance? ◯ Yes ◯ No

Pledged? ◯ Yes ◯ No

Disability Insurance	Applicant	Co-Applicant
Monthly Distribution if Disabled		
Number of Years Covered		

Schedule 8 (Privately Owned Business)

Business Name and Address	Type of Business	Owner	Cost of Investment	% Ownership	Date of Investment	Present Net Book Value of Investment
Total			$0			$0

Schedule 9 (Accounts & Notes Receivable)

Due From	Date of Acct.	Original Amount	Present Balance	Repayment Terms
Total		$0	$0	

Schedule 10 (Accounts, Notes & Taxes Payable)

Due To	Date of Acct.	Original Amount	Present Balance	Repayment Terms
Total		$0	$0	

Schedule 11 (Other Liabilities - Include Alimony or Child Support)

Item	Amount Due
Total	$0

Fill in all schedules which follow before completing the balance sheet above. When there is nothing to report, indicate "none" on the schedule and "O" on the balance. sheet form. Only those totals from the schedule with the heavy border should be included in the balance sheet.

Details relative to Assets and Liabilities: If space is insufficient, attach a supplemental list.

Schedule 12 (Personal Effects: List any items which you feel are significant enough to note, such as jewelry, furs, art, etc.)

Item	Owner	Cost	Estimated Present Value
Total		$0	$0

Schedule 13 (Other Major Assets: List any other items not already included such as airplanes, boats, etc.)

Item	Owner	Cost	Estimated Present Value
Total		$0	$0

Schedule 14 (Contingent or Deferred Assets: Trusts, Vested Pensions, Deferred Income, Stock Options, 401-K, IRA, etc.)

Item	Owner	Cost	Estimated Present Value
Total		$0	$0

Patriot Act: To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. What this means for you: when you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

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