FOR YOUR CONVENIENCE YOU DO NOT NEED TO COMPLETE THIS DOCUMENT BUY HAND- IT IS POSSIBLE TO TAB THROUGH THE FIELDS WITHIN MICROSOFT WORD- JUST SAVE IT WHEN YOU ARE DONE TO EMAIL IT BACK TO US.

Please read the following directions before completing this Personal Financial Statement.

1. Complete all sections, except Section 2, if you are applying for individual credit in your own name and are relying solely on your own income or assets for repayment or if this personal financial statement relates to your guaranty of the indebtedness of other person(s), firm(s), and corporation(s).

2. Complete Section 2 if any of the following apply:

   - You are applying for joint credit with another person and provide information about the joint applicant.
   - You are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, provide information about the person on whose alimony, support or maintenance payments or income or assets you are relying.
   - This is a joint guaranty of the indebtedness of other person(s), firm(s), corporation(s), provide information about the joint guarantor.

Section 1 - Individual/Applicant Information (Please Print)			**Section 2** - Other Party/Co-Applicant Information (Please Print)		
Name			Name		
Residence Address			Residence Address		
City	State	Zip	City	State	Zip
Position or Occupation			Position or Occupation		
Business Name			Business Name		
Business Address			Business Address		
City	State	Zip	City	State	Zip
Years with Business			Years with Business		
Res. Phone	Bus. Phone		Res. Phone	Bus. Phone	
Date Signed	**Signature (applicant)**		**Social Security #**	**Date of Birth**	

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Date Signed	Signature (co-applicant)	Social Security #	Date of Birth

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Statement of Financial Condition as of

Section 3 - Balance Sheet (attach additional schedules as needed)

Assets	Dollars	Jt*	**Liabilities**	Dollars	Jt*
Cash and Short-term Investments (Schedule A)		☐	Outstanding Credit Card Balances		☐
Stocks & Bonds (readily marketable) (Schedule B)		☐	Taxes Payable		☐
Unlisted Securities (Schedule C)		☐	Policy Loan (life insurance) (Schedule D)		☐
Notes Receivable & Accounts Receivable		☐	Mortgages & Obligations Due (Schedules F & G		☐
Cash Surrender Value-Life Insurance (Schedule D)		☐	Notes & Accounts Payable (Schedule H)		☐
General/Ltd Partnership Interests (Schedule E)		☐	Other Liabilities (list):		☐
Retirement Accounts		☐			☐
Personal Property		☐			☐
Automobiles		☐			☐
Real Estate-Personal Residences (Schedule F)		☐			☐
Real Estate-Investments (Schedule G)		☐			☐
Real Estate Investments (Direct & Partnership Interests) (Schedule I)**		☐			☐
Other Assets (list):		☐			☐
		☐			☐
		☐			☐
		☐			☐
ASSETS	0.00		TOTAL LIABILITIES	0.00	
			NET WORTH (total assets minus total liabilities)	0.00	

Section 4 - Income statement

Annual Income	Applicant	Co-Applicant	Annual Expenses	Applicant	Co-Applicant
Salary			Home Mortgage (Principal & Interest)		
Bonus and Commissions			Loan Payments (including other R/E)		
Interest and Dividends			Income Tax (State & Federal)		
Alimony, Separate Maintenance, Child Support ***			Planned or Required Investments/ Partnership Contributions		
Capital Gains			General Living Expenses		
Real Estate Income			Other Expenses (list):		
Other Income (list):					
GROSS INCOME	0.00	0.00	TOTAL EXPENSES	0.00	0.00

Section 5 - Contingent Liabilities (include brief description)

	Applicant	Co-Applicant
As endorser or guarantor on notes/leases/contracts:		
On letters of credit:		
Current or pending suits or other litigation:		
Other (list):		
TOTAL	0.00	0.00

** Schedule I should be used by individuals with extensive real estate investments where additional data may be needed or required by Autumn Financial Group to properly evaluate the borrower's financial condition. It can be used instead of Schedule G. Because it will not be completed by most borrowers or guarantors, it is a separate schedule not printed on the Personal Financial Statement. If it is appropriate for you and has not been provided, please request it from Autumn Financial Group.

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

Schedule A: Cash & Short term Investments (certificates of deposit, commercial paper, money market funds, etc.)						
Name of Institution	Savings Accts ($ amount)	Checking Accts ($ amount)	Other Short-term Investments Type and $ amount	Total	Pledged? (Y/N)	Owner(s) Code*
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
			Total:	0.00		

Schedule B: Stocks and Bonds (including U.S. Government and Marketable Securities)						
Number of Shares or Face value	Description	Market Value	Margin? (Y/N)	Restricted? (Y/N)	Pledged? (Y/N)	Owner(s) Code*
			☐	☐	☐	
			☐	☐	☐	
			☐	☐	☐	
			☐	☐	☐	
			☐	☐	☐	
			☐	☐	☐	
	Total:	0.00				

Schedule C: Unlisted Securities						
Number of Shares	Description	Source of Value	Values	% of Company Owned	Pledged? (Y/N)	Owner(s) (Y/N)
					☐	☐
					☐	☐
					☐	☐
		Total:	0.00			

Schedule D: Life Insurance Carried (include individual and group insurance)						
Name of Insurance Company	Owner of Policy	Beneficiary	Face Value	Policy Loans	Cash Surrender	Assigned? (Y/N)
Page: 4						☐
						☐
						☐
		Total:	0.00			

Schedule E: General and/or Limited Partnership Interests (Please attach K-1)							
Name of Partnership	Type of Investment	(L)imited (G)eneral	Amount Invested	Fair Market Value of Interest	Annual Contributio n Required	Pledged? (Y/N)	Owner(s) (Y/N)
		L = Limite				☐	☐
		L = Limite				☐	☐
		L = Limite				☐	☐
		Total:	0.00	0.00			

Owner(s) Code: A=Applicant C=Co-applicant AC=Joint Account of Applicant and Co-Applicant JA=Joint Account of Applicant and another party JC=Joint Account of Co-Applicant and another party

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Schedule G: Real Estate Investments											
Description/Address of Property	Mortgage Holder	Maturity Date	% Owned	Title in Name of	Purchase Date	Cost	Present Loan Balance	Market Value	Total Annual Rental Income	Monthly Loan Payt.	Other Expenses
					Total:	0.00	0.00	0.00	0.00	0.00	0.00

Schedule H: Notes & Accounts Payable (also include credit lines and other commitments even if unused)							
Name of Creditor	Orig. Amt. of Loan	Payment/ Repayment Terms	Maturity Date	Interest Rate	Description of collateral (if any)	Balance Owing	Debtor(s)
Total:	0.00					0.00	

Debtor Codes: A=Applicant C=Co-applicant AC=Joint Account of Applicant and Co-Applicant JA=Joint Account of Applicant and another party JC=Joint Account of Co-Applicant and another party

Personal Information			
Are any assets pledged other than as described on schedules? ☐ Yes ☐ No If Yes, describe:			
Have you ever declared bankruptcy? ☐ Yes ☐ No If Yes, describe:			
Are there any outstanding judgments against you? ☐ Yes ☐ No	Do you have disability insurance?	Income tax settled through (date)	Alimony, Child Support/Maintenance Expense $

The information contained in this statement is provided for the purpose of obtaining, or maintaining credit with Autumn Financial Group on behalf of the undersigned or person, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in Autumn Financial Group's favor. Each undersigned understands that Autumn Financial Group is relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants that the information provided is true and complete and that Autumn Financial Group may consider this statement as continuing to be true and correct until a written notice of a change is given to Autumn Financial Group by the undersigned. Autumn Financial Group is authorized to make all inquiries it deems necessary to verify the accuracy of the statements made herein, and to determine the credit worthiness of the undersigned. Autumn Financial Group is authorized to answer questions about its credit experience with the above signed.