

# Personal Financial Statement



**First National Bank**  
ALASKA  
MEMBER FDIC

An individual applicant or a loan guarantor may submit this Personal Financial Statement as an attachment to a commercial loan request. Only two individuals/guarantors who share significant assets/liabilities may use a single form. Please do not list business owned assets on this form, however, do list the equity in any business you own. To determine business equity, complete a FNBA Commercial Balance Sheet form or see your businesses' balance sheet.

| Principal/Guarantor    |    |                |            | Principal/Guarantor    |    |                |            |
|------------------------|----|----------------|------------|------------------------|----|----------------|------------|
| First Name             | MI | Last Name      | Jr/Sr      | First Name             | MI | Last Name      | Jr/Sr      |
| Mailing Address        |    | E-mail Address |            | Mailing Address        |    | E-mail Address |            |
| City                   |    | State          | Zip Code   | City                   |    | State          | Zip Code   |
| Social Security Number |    | Date of Birth  | Home Phone | Social Security Number |    | Date of Birth  | Home Phone |

| Occupation       |  |                       |  |                  |  |                       |  |
|------------------|--|-----------------------|--|------------------|--|-----------------------|--|
| Employer         |  | Work Phone/Cell Phone |  | Employer         |  | Work Phone/Cell Phone |  |
| Employer Address |  |                       |  | Employer Address |  |                       |  |
| Position         |  | How Long (years)      |  | Position         |  | How Long (years)      |  |

| Income  |           |                       |           |
|---|-----------|-----------------------|-----------|
| <i>List sources of income below. Income from alimony or child support payments need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.</i> |           |                       |           |
| Gross Monthly Salary  |           | Gross Monthly Salary  |           |
| Bonus and Commissions   |           | Bonus and Commissions |           |
| Rental Income   |           | Rental Income         |           |
| Dividend Income   |           | Dividend Income       |           |
| Other   |           | Other                 |           |
| <b>Total</b>  | <b>\$</b> | <b>Total</b>          | <b>\$</b> |

| Additional Information                                  |   |  |                         |
|---|---|--|-------------------------|
| Are you a guarantor on any loan or contract?            | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | If "yes," for whom?  | To whom owed?           |
| Are there any unsatisfied judgments against you?        | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | Amount \$  | If "yes," to whom owed? |
| Have you been adjudicated bankrupt in the last 7 years? | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | If "yes," where?   | If "yes," when?         |
| Is the security for the loan your primary residence?    | <input type="checkbox"/> Yes<br><input type="checkbox"/> No | If "yes," please give the name of your spouse if different from above. |                         |

## Financial Statement

| Assets   | Value | Liabilities   | Mo. Payments | Balance Owning |
|--|-------|---|--------------|----------------|
| Cash in First National Bank Alaska   |       | Installment Loans<br>Lender:  |              |                |
| Cash in other Institutions/On Hand Institution:                            |       |   |              |                |
| Market Value of Stocks/Bonds (Non-Retirement)                              |       |   |              |                |
| Profit Sharing/Retirement  |       | Home Equity Line of Credit<br>Lender:                                 |              |                |
| Total Current Value of Real Estate (Total from Real Estate Schedule Below) |       | Total Mo Mtg Payments/Balance (Total from Real Estate Schedule Below) |              |                |
| Automobile<br>Yr            Make   |       | Auto Loan<br>Lender:  |              |                |
| Automobile<br>Yr            Make   |       | Auto Loan<br>Lender:  |              |                |
| Boat/Recreational Vehicle<br>Yr            Make                            |       | Boat/Rec. Vehicle Loan<br>Lender:                                     |              |                |
| Boat/Recreational Vehicle<br>Yr            Make                            |       | Boat/Rec. Vehicle Loan<br>Lender:                                     |              |                |
| Personal Property  |       | Credit Cards<br>Lender:   |              |                |
| Business Equity (Bus. Asset – Bus. Liabilities)                            |       |   |              |                |
| Other Assets   |       |   |              |                |
|  |       | Other Debt<br>Lender:   |              |                |
|  |       |   |              |                |
|  |       |   |              |                |
|  |       | Taxes Due   |              |                |
|  |       | Alimony/Child Support   |              |                |
|  |       | <b>TOTAL LIABILITIES</b>  |              |                |
| <b>TOTAL ASSETS</b>  |       | <b>NET WORTH (ASSETS MINUS LIABILITIES)</b>                           |              |                |

## Real Estate Schedule

*Note: Attach additional sheets if necessary.*

| Address / Description | Purchase Date | Mortgage Holder | Current Value | Rental Income | Current Loan Balance | Loan Payment |
|-----------------------|---------------|-----------------|---------------|---------------|----------------------|--------------|
|                       |               |                 |               |               |                      |              |
|                       |               |                 |               |               |                      |              |
|                       |               |                 |               |               |                      |              |
|                       |               | <b>TOTAL</b>    | <b>\$</b>     | <b>\$</b>     | <b>\$</b>            |              |

Everything that I/we have stated on this personal financial statement is correct to the best of my/our knowledge. I/we understand that you will retain this application whether or not my/our request for credit is approved. You are authorized to check my/our credit and employment history and to answer questions about your credit experience with me/us.

Principal/Guarantor's Signature \_\_\_\_\_

Date \_\_\_\_\_

Principal/Guarantor's Signature \_\_\_\_\_

Date \_\_\_\_\_