

PERSONAL FINANCIAL STATEMENT AS OF_____

DEDCONAL INFORMATION

| APPLICANT (NAME): | | | | CO-APPLICANT (NA | ME): | | | |
|---|---------------|--|--|--|--|----------------------------|--|-----------------|
| Employer: | | | | Employer: | | | | |
| Address of Employer: | | | | Address of Employer: | | | | |
| | of Years with | Title/Position | on: | Business Phone Number: No. of Years with Employer: | | | Title/Posi | tion: |
| Name of previous employer & position (if with current employer less than 3 yrs) No. of Yrs. | | | Name of previous employed less than 3 yrs) | er & position (i | f with current e | mployer | No. of Yr | |
| Home Address: | | | Home Address: | | | | | |
| Home Phone Number: Social | Security No.: | Date of I | Birth: | Home Phone Number: | Social Securi | ty No.: | Date of B | irth: |
| Cell Phone Number: | Fax Number | :: | | Cell Phone Number: | | Fax Number | : | |
| Name & Phone Number of your Account | ntant: | | | Name & Phone Number of | f your Accounta | nnt: | | |
| Name & Phone Number of your Attorne | ey: | | | Name & Phone Number of | f your Attorney | : | | |
| Name & Phone Number of your Insurance Advisor: | | | Name & Phone Number of your Insurance Advisor: | | | | | |
| | | | | | | | | |
| Cash Income & E | xpenditures | s Stateme | ent For Year | r Ended | (01 | nit cents in f | orm below | ·) : |
| Cash Income & E ANNUAL INCOM | | | ent For Year DUNT (\$) | r EndedANNUAL EX | _ | | | |
| ANNUAL INCOM Salary (applicant) | | AM (| | ANNUAL EX Federal Income and Oth | PENDITU her Taxes | | | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) | Æ. | AM0 \$ | | ANNUAL EX Federal Income and Other State Income and Other | PENDITU her Taxes Taxes | RES | AM(\$ \$ | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican | ME at) | AMC \$ \$ \$ \$ | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-o | PENDITU her Taxes Taxes p or Condo M | aintenance | AMO \$ \$ \$ \$ | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican | ME at) | AMC \$ \$ \$ \$ | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-op Mortgage Payments – F | PENDITU ner Taxes Taxes p or Condo M Residential Pro | aintenance operty | AM(\$ \$ \$ \$ \$ | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican | ME at) | \$ \$ \$ \$ \$ \$ \$ \$ \$ | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-op Mortgage Payments – F Mortgage Payments – I | ner Taxes Taxes Taxes p or Condo M Residential Pronvestment Pro | aintenance operty | AMC \$ \$ \$ \$ | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican Bonuses & Commissions (co-applican | ME at) | ************************************** | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-op Mortgage Payments – F Mortgage Payments – I Property Taxes – Resid | PENDITUME TAXES TAXES POR CONDOM Residential Propertial | aintenance perty perty y | ************************************** | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican Bonuses & Commissions (co-applican Rental Income | ME at) | ************************************** | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-op Mortgage Payments – F Mortgage Payments – I Property Taxes – Resid Property Taxes – Invest | PENDITUME TAXES TAXES POR CONDO M Residential Provestment Propertiment | aintenance pperty pperty y | ************************************** | |
| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican Bonuses & Commissions (co-applican Rental Income Interest Income Dividend Income Capital Gains | ME at) | ************************************** | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-op Mortgage Payments – F Mortgage Payments – I Property Taxes – Resid | PENDITUME TAXES TAXES POR CONDO M Residential Provestment Propertiment | aintenance perty perty y y | ************************************** | |
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| ANNUAL INCOM Salary (applicant) Salary (co-applicant) Bonuses & Commissions (applican Bonuses & Commissions (co-applican Rental Income Interest Income Dividend Income Capital Gains Partnership Income Other Investment Income | ME at) | ************************************** | | ANNUAL EX Federal Income and Other State Income and Other Rental Payments, Co-op Mortgage Payments – F Mortgage Payments – I Property Taxes – Resid Property Taxes – Invest Interest & Principal Pay Insurance Investments (including | PENDITUME TAXES TAXES POR CONDO M Residential Provestment Propertiment Property Tyments on Locatax shelters) | aintenance perty perty y y | ************************************** | |
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** 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 repaying this obligation.

| Ral | ance | Sheet | as of |
|-----|------|-------|-------|
| Dal | ише | Juce | 45 UI |

| ASSETS | AMT. (\$) | LIABILITIES | AMT. (\$) |
|---|-----------|---|-----------|
| Cash in this Bank (including money market accts. & CD's) | \$ | Notes Payable to this Bank | \$ |
| Cash in other Fin. Inst. (list below) (list same as above) | \$ | Secured | \$ |
| | \$ | Unsecured | \$ |
| | \$ | Notes Payable to Others (from Schedule E) | \$ |
| | \$ | Secured | \$ |
| | \$ | Unsecured | \$ |
| Readily Marketable Securities (from Schedule A) | \$ | Accounts Payable | \$ |
| Non-Readily Marketable Securities (from Schedule A) | \$ | Credit Cards | \$ |
| Accounts and Notes Receivable | \$ | Margin Accounts | \$ |
| Net Cash Surrender Value of Life Ins. (from Schedule B) | \$ | Notes Due: Partnership (from Schedule D) | \$ |
| Residential Real Estate (from Schedule C) | \$ | Taxes Payable | \$ |
| Real Estate Investments (from Schedule C) | \$ | Mortgage Debt (from Schedule C) | \$ |
| Partnerships/PC Interests (from Schedule D) | \$ | Life Insurance Loans (from Schedule B) | \$ |
| IRA, Keogh, Profit-Sharing & Other Vested Retirement Accts. | \$ | Other Liabilities (list below) | \$ |
| Deferred Income (number of years deferred) | \$ | | \$ |
| Personal Property (including automobiles - list) | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| Other Assets (list) | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | TOTAL LIABILITIES | \$ |
| TOTAL ASSETS | \$ | NET WORTH | \$ |

| YES | NO | AMOUNT |
|-----|-----|--------|
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| | | \$ |
| | YES | YES NO |

If yes for any of the above, give details:

| No Shares | | | | | CURRENT | PLEI | OGED |
|---------------|----------------------------|--------------------------------|----------------------|------|---------|------|------|
| Stock or Face | DESCRIPTION | OWNERS | WHERE | COST | MARKET | | |
| Value Bonds | | | HELD | | VALUE | YES | NO |
| READILY MARKI | ETABLE SECURITIES (includi | ng U.S. Governments and I | Municipalities) | | | | |
| | | | | \$ | \$ | | |
| | | | | \$ | \$ | | |
| | | | | \$ | \$ | | |
| | | | | \$ | \$ | | |
| | | | | \$ | \$ | | |
| | | | | \$ | \$ | | |
| NON-READILY M | ARKETABLE SECURITIES (| closely held, thinly traded, o | or restricted stock) | • | • | • | • |
| | · | • | | \$ | \$ | | |
| | | | | \$ | \$ | | |

^{**} If not enough space, attach a separate schedule or brokerage statement and enter totals only.

| SCHEDULE B – INSURANCE (Life Insurance – use additional sheet if necessary) (be sure to post totals to proper line on Balance Sheet) | | | | | | |
|--|-----------------------|----------------|-------------|-------------------------|--------------------|-----------|
| Insurance Company | Face Amount of Policy | Type of Policy | Beneficiary | Cash Surrender Value | Amount Borrowed | Ownership |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

| | | Purc | hase | Market | Present | Int. | Maturity | Monthly | Lender |
|---------------------|---------------|--------|--------|------------|----------------|------------|---------------|----------------------|--------|
| Property Address | Legal Owner | Year | Price | Value | Ln. Bal. | Rate | Date | Payment | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| SCHEDULE C – INVE | ESTMENT PROPE | RTY MO | RTGAGI | E DEBT (be | sure to post t | otals to p | roper line on | Balance Sheet | i) |
| Investment Property | | Purc | hase | Market | Present | Int. | Maturity | Monthly | Lender |
| Address | Legal Owner | Year | Price | Value | Ln. Bal. | Rate | Date | Payment | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | 1 | | |

| SCHEDULE D -PARTNERSHIPS (less than majority ownership for real estate partnerships)* (be sure to post totals to proper line on Balance Sheet) | | | | | | |
|--|---------------------------------------|------|------------------|----------------------------|--|-------------------------------|
| TYPE OF INVESTMENT | DATE OF INITIAL INVESTMENT | COST | PERCENT OWNED | CURRENT MARKET VALUE | BALANCE DUE ON PARTNERSHIP NOTES, CASH CALLS | FINAL CONTRIBUTION DATE |
| Business/Professional (indicate name) | Business/Professional (indicate name) | | | | | |
| | | | | | | |
| Investments (including Tax Shelters) | | | | | | |
| | | | | | | |
| | | _ | | | | |
| | | | | | | |
| | | | | | | |

^{*} Note for investments which represent a material portion of your total assets, please include the relevant financial statements or tax returns, or in the case of partnership investments or S-corporations, schedule K'-1s.

| SCHEDULE E – NOTES PAYABLE | | | | | | | | |
|----------------------------|----------|---------|------|-----|------------|------|----------|---------|
| | TYPE OF | AMOUNT | SECU | RED | | INT. | | UNPAID |
| DUE TO | FACILITY | OF LOAN | YES | NO | COLLATERAL | RATE | MATURITY | BALANCE |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Representations and Warranties:

The information contained in this statement is provided to induce you to extend or to continue the extension of credit to the undersigned or to others upon the guarantee of the undersigned. The undersigned acknowledge and understand that you are relying on the information provided herein in deciding to grant or continue credit or to accept a guarantee thereof. Each of the undersigned represents warrants and certifies that the information provided herein is true, correct and complete. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you. In the absence of such notice or a new and full written statement, this should be considered as a continuing statement and substantially correct. If the undersigned fail to notify you as required above, or if any of the information herein should prove to be inaccurate or incomplete in any material respect, you may declare the indebtedness of the undersigned or the indebtedness guaranteed by the undersigned, as the case may be, immediately due and payable. You are authorized to make all inquiries you deem necessary to verify the accuracy of the information contained herein and to determine the credit-worthiness of the undersigned. The undersigned authorizes any person or consumer reporting agency to give you any information it may have on the undersigned. Each of the undersigned authorizes you to answer questions about your credit experience with the undersigned. As long as any obligation or guarantee of the undersigned to you is outstanding, the undersigned shall supply annually an updated financial statement. This personal financial statement and any other financial or other information that the undersigned gives to you shall be your property.

The undersigned certifies that the information provided on and with this form, including financial statements, is complete and correct and that we are authorized to execute this form on behalf of the Applicant. Applicant authorizes Coastall Credit Union ('the Credit Union') to obtain credit reports and to release credit information to others (please see our privacy statement) regarding Applicant from time to time. Applicant also authorizes the Credit Union to obtain copies of its tax returns and information from the IRS and other taxing authorities and agrees to execute whatever forms the Bank requests to obtain such information.

I/We understand that any willful misrepresentations of information provided in my/our Applicant statement could result in fine and/or imprisonment under the provisions of the U.S. Criminal Code.

| Date: | Applicant's Signature |
|-------|---|
| Date: | Co-Applicant's Signature (If you are requesting the financial accommodation jointly.) |