



Personal Financial Statement dated: \_\_\_\_\_

|                       |  |                     |  |                       |  |                     |  |
|-----------------------|--|---------------------|--|-----------------------|--|---------------------|--|
| <b>Individual #1:</b> |  |                     |  | <b>Individual #2:</b> |  |                     |  |
| Name: _____           |  |                     |  | Name: _____           |  |                     |  |
| Address: _____        |  |                     |  | Address: _____        |  |                     |  |
| City: _____           |  | State: _____        |  | City: _____           |  | State: _____        |  |
| SSN: _____            |  | Birthday: _____     |  | SSN: _____            |  | Birthday: _____     |  |
| Home Phone: _____     |  | Work Phone: _____   |  | Home Phone: _____     |  | Work Phone: _____   |  |
| Cell Phone: _____     |  | DL # & State: _____ |  | Cell Phone: _____     |  | DL # & State: _____ |  |
| DL Iss. Date: _____   |  | DL Exp. Date: _____ |  | DL Iss. Date: _____   |  | DL Exp. Date: _____ |  |
| Employer: _____       |  | Email: _____        |  | Employer: _____       |  | Email: _____        |  |

**NOTE:** If this personal financial statement includes a second individual who is borrowing or guaranteeing debt with Coffee County Bank, the columns titled Solely Owned #2 and Solely Liable #2 should be completed.

For the post references in each row [e.g. (1), (2), (3)], please itemize each subject on the corresponding attached schedules.

| <b>Assets</b>                          | <b>Solely Owned</b> |               | Jointly Owned | Total |
|--|---------------------|---------------|---------------|-------|
|  | Individual #1       | Individual #2 |               |       |
| Cash, Money Market, CD's (1)           |                     |               |               |       |
| Government & Marketable Securities (2) |                     |               |               |       |
| Closely-Held Securities (3)            |                     |               |               |       |
| Accounts or Notes Receivable           |                     |               |               |       |
| Cash Value of Life Insurance (4)       |                     |               |               |       |
| Personal Residence (5)                 |                     |               |               |       |
| Other Real Estate (5)                  |                     |               |               |       |
| Personal Property                      |                     |               |               |       |
| IRA's, 401K's, Keoughs, Etc.           |                     |               |               |       |
| Other Assets                           |                     |               |               |       |
| <b>Totals:</b>                         |                     |               |               |       |

| <b>Liabilities</b>                     | <b>Solely Liable</b> |               | Jointly Liable | Total |
|--|----------------------|---------------|----------------|-------|
|  | Individual #1        | Individual #2 |                |       |
| Notes Payable to Banks - Secured (6)   |                      |               |                |       |
| Notes Payable to Banks - Unsecured (6) |                      |               |                |       |
| Other Notes Payable - Secured (6)      |                      |               |                |       |
| Other Notes Payable - Unsecured (6)    |                      |               |                |       |
| Accounts Payable & Credit Cards        |                      |               |                |       |
| Real Estate Mortgages (5)              |                      |               |                |       |
| Tax Liability                          |                      |               |                |       |
| Loans on Life Insurance (4)            |                      |               |                |       |
| Margin Accounts                        |                      |               |                |       |
| Other Liabilities                      |                      |               |                |       |
| <b>Totals:</b>                         |                      |               |                |       |

| <b>Net Worth</b> | Individual #1 | Individual #2 | Combined Net Worth | Total |
|------------------|---------------|---------------|--------------------|-------|
| Total Net Worth  |               |               |                    |       |

| <b>Contingent Liabilities</b>   | Individual #1 | Individual #2 | Jointly Liable | Total |
|---------------------------------|---------------|---------------|----------------|-------|
| As Guarantor or as Endorser (7) |               |               |                |       |
| Other Contingent Debt (7)       |               |               |                |       |
| <b>Totals:</b>                  |               |               |                |       |

\*Above Contingent Liabilities section must be completed. If no contingent debt is involved, please write or type **NONE** in the above section.

| <b>For the Year:</b>             |               | <b>For the Year:</b> |                           |               |               |
|----------------------------------|---------------|----------------------|---------------------------|---------------|---------------|
| <b>Sources of Income</b>         | Individual #1 | Individual #2        | <b>Monthly Spending</b>   | Individual #1 | Individual #2 |
| Wages & Salaries                 |               |                      | Mortgage/Rent - Residence |               |               |
| Commissions, Bonuses, Etc.       |               |                      | Other Mortgages           |               |               |
| Interest & Dividends             |               |                      | Automobile                |               |               |
| Rental Income                    |               |                      | Credit Cards              |               |               |
| Distributions, Partnership Draws |               |                      | Alimony                   |               |               |
| Other                            |               |                      | Other                     |               |               |
| Total Income:                    |               |                      | Total Expenditures:       |               |               |

