

2736 Nall Street
Port Neches, TX 77651
(409) 727-1446 (800) 846-1751
www.mctcu.org



Statement Date _____

☐ Individual ☐ Joint

Personal Financial Statement

Name:		Primary Phone:
Residence Address:		Secondary Phone:
City, State, & Zip Code:		Email:
Date of Birth:		Occupation:
Social Security Number:		Employer Name:
Drivers License Number:		Number of Years:
Mother's Maiden Name:		Annual Compensation:
Do You have a Will / Trust? ☐ Yes ☐ No		Will or Trust Executor Name:
Marital Status: ☐ Married ☐ Separated ☐ Unmarried (includes single, divorced, and widowed)		
Are you a party to any claims or lawsuits or have you ever filed bankruptcy or had a judgement against you? ☐ Yes ☐ No		
Do you have any delinquent loan payments over 30 days past due or in default? ☐ Yes ☐ No		

**(Please attach explanatory notes or detailed schedules as needed)*

Assets		Liabilities	
Cash & Deposit Accounts		Mortgages - Primary Residence	
401K & IRAs		Mortgages - Other Real Estate	
Publicly traded Stocks, Bonds, Investments		Installment Loans	
Privately held Business Interests		Credit Cards / Line of Credit	
Accounts & Notes Receivable		Unpaid Taxes Due	
Primary Residence		Other Liabilities	
Other Real Estate		Total Liabilities	
Other Assets			
Total Assets		(Assets - Liabilities) Net Worth	

Contingent Liabilities		(explanation)
Guarantor on Loans		
Other Contingent Liabilities		
Total Contingent Liabilities		

Statement of Cash Flow			
Salary or Wages		Debt Payments	
Rental Property (Gross Income)		Taxes	
Business (Net Income)		Insurance	
Other Income*		Non-Debt Living Expenses	
Total Income		Total Expenses	

*only complete if you wish to have other income considered as a loan repayment source

Cash & Deposits			
Name of Credit Union of Bank	Amount	Are these pledged as collateral?	Comments

401K & Retirement Accounts		
Account Owner's Name	Amount	Comments

Stocks, Bonds, and Investments (Publicly Traded)				
Name of Issuer or Symbol	Market Value	Number of Shares	Price per Share	Comments

Business Ownership Interests (Privately Held)			
Business Name	Market Value	Ownership %	Comments

Account & Note Receivables (People or businesses that owe you money)

Borrower's Name	Amount Owed	Comments

Real Estate (please attach explanatory notes or detailed schedules as needed)

Homestead or Investment	Homestead	Investment	Investment	Investment	Investment
Address					
Market Value					
Loan Balance					
Loan Payment					
Monthly Rental Income					
Year Acquired					
Cost					

Debt (not secured by real estate)

Name of Credit Union or Bank	Current Loan Balance	Loan Payment	Collateral / Comments

Life Insurance

Term or Whole	Face Amount	Cash Value	Beneficiary / Assignee	Company

Other Assets (all assets that are not already reported in other sections)

Type	Value	Comments

Authorization

I/we have carefully read and submitted the foregoing information provided on all pages of this statement to the MCT Credit Union. The information is presented as a true and accurate statement of my/our financial condition to the best of my/our knowledge on the date indicated. This statement is provided for the purpose of obtaining and maintaining credit with MCT Credit Union. I/we agree that if any material change(s) occur(s) in my/our financial condition that I/we will immediately notify MCT Credit Union of said change(s) and unless MCT Credit Union is so notified it may continue to rely upon this financial statement and the representations made herein as a true and accurate statement of my/our financial condition. I/we authorize MCT Credit Union to make whatever credit inquiries it deems necessary in connection with this financial statement. I/we authorize and instruct any person or consumer reporting agency to furnish to MCT Credit Union any information that it may have or obtain in response to such credit inquiries.

Applicant's Signature _____

Date _____

Spouse's Signature (if applicable) _____

Date _____