

# FINANCIAL STATEMENT AND APPLICATION – SECTION 1

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Number of years at this address: \_\_\_\_\_

Previous address If less than 3 years at current address:  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Social Security # and Tax I.D. if self-employed: \_\_\_\_\_  
 Employer: \_\_\_\_\_  
 Employer Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Position or occupation: \_\_\_\_\_  
 Salary (include bonus and or commission) \$ \_\_\_\_\_  
 Dividends \$ \_\_\_\_\_  
 Rental Income \$ \_\_\_\_\_  
 Other (Specify) \$ \_\_\_\_\_  
 Total \$ \_\_\_\_\_  
 Total last year income \$ \_\_\_\_\_  
 Are you obligated to pay alimony or child support?  YES  NO If yes how much: \$ \_\_\_\_\_  
 Income tax settled through: \_\_\_\_\_  
 Have you ever declared bankruptcy?  YES  NO  
 Are you a defendant in any legal actions?  YES  NO

**Assets**

Bank Accounts	\$ _____	Notes payable to banks and others	\$ _____
Government and marketable securities	\$ _____	Mortgage(s) payable	\$ _____
Privately owned Companies	\$ _____	Unpaid income tax	\$ _____
Partial interest in real estate	\$ _____	State	\$ _____
Real Estate owned	\$ _____	Federal	\$ _____
Cash surrender value of life insurance	\$ _____	Credit card or charge accounts	\$ _____
Personal Property	\$ _____	Installation debt	\$ _____
Other Assets- List		Other debt –List	
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
<b>Total Assets</b>	<b>\$ _____</b>	<b>Total Liabilities</b>	<b>\$ _____</b>

**Total assets less total liabilities** \$ \_\_\_\_\_

Do you have any contingent liabilities or are you a co-maker on any loans?  YES  NO  
 If yes, explain \_\_\_\_\_



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## FINANCIAL STATEMENT AND APPLICATION – SECTION II

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**Real Estate Owned**

Address \_\_\_\_\_ Title in Name of \_\_\_\_\_ Date Acquired \_\_\_\_\_ Cost \_\_\_\_\_ Mortgage Amount \_\_\_\_\_

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(Add separate attachment for additional real estate holdings.)

**Partial Interest in Real Estate**

Address \_\_\_\_\_ Title in Name of \_\_\_\_\_ Date Acquired \_\_\_\_\_ Cost \_\_\_\_\_ Mortgage Amount \_\_\_\_\_

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**Government & Marketable Securities**

# Of Shares \_\_\_\_\_ Description \_\_\_\_\_ In Name of \_\_\_\_\_ Market Value \_\_\_\_\_ Pledged Y/N \_\_\_\_\_

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**Life Insurance Owned**

Insurance Co. \_\_\_\_\_ Owner of Policy \_\_\_\_\_ Face Amount \_\_\_\_\_ Policy Loans \_\_\_\_\_ Cash Surrender Value \_\_\_\_\_

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**Loans Open/Closed**

Bank \_\_\_\_\_ Address \_\_\_\_\_ Telephone \_\_\_\_\_ High Credit \_\_\_\_\_ Balance Monthly/ Annual Payment Amount \_\_\_\_\_

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The information provided by me in this statement is for the purpose of obtaining credit. The undersigned recognizes & understands that the credit grantor is relying in the information provided to determine an approval of my/ our knowledge and you as a credit grantor may continue to rely on this until a written statement of change is provided. You are authorized to make all inquiries you deem necessary to verify the accuracy of the statement made herein and to determine my/ our credit worthiness

Date: \_\_\_\_\_ Signature: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date of Birth: \_\_\_\_\_



J.A. Aero, Inc. \* DuPage Airport \* West Chicago, IL 60185  
Phone 630/584-3200 \* Fax: 630/513-8408  
Email: [scott@jaaero.com](mailto:scott@jaaero.com) \* Web: [www.jaaero.com](http://www.jaaero.com)