

**FINANCIAL STATEMENT-INDIVIDUAL**

**Date of Statement:**

Name of Individual(s)		Type of Statement	To Financial Institution Named	
		<input type="checkbox"/> INDIVIDUAL CREDIT <input type="checkbox"/> JOINT CREDIT If Joint, initial here: ___ ___	AMERICAN HERITAGE BANK PO BOX 1408 SAPULPA OK 74067	
Home Address		Home Phone	Social Security Number	Date of Birth

ASSETS (Omit Cents)		LIABILITIES (Omit Cents)	
Cash and Money Market (Schedule A)		Notes Payable (Schedule J)	
Notes or Accounts Due Me (Schedule B)		Loans Secured By Real Estate (Schedule I)	
Stocks/ Bonds-Marketable (Schedule C)		Life Insurance Policy Loans 9 (Schedule E)	
Other Stocks and Bonds (Schedule C)		Taxes Due (Federal, State, Local)	
Partnership/Proprietorships (Schedule D)		Credit Card Indebtedness	
Cash Surrender Value Life Ins (Schedule E)		Due Brokers-Margin Accounts (Schedule K)	
Real Estate owned (Schedule I)		Other Accounts/Bills Payable (Schedule K)	
Oil & Gas Interests (Schedule F)			
Vested Pension/Retirement (Schedule G)			
IRA and Keough Plans (Schedule G)		<b>TOTAL LIABILITIES</b>	
Other Personal Assets (Schedule H)		<b>NET WORTH</b>	
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES and NET WORTH</b>	

INCOME AND EXPENSES FOR YEAR ENDING _____			
Salaries and Wages		Interest Paid	
Commissions and Bonuses		Rent Paid	
Interest Income		Federal and State Income Taxes	
Dividend Income		Other Taxes	
Business Income		Alimony, Child Support and Separate Maint.	
Pensions, Annuities, Social Security			
Rental Income			
Other Income to be considered			
<b>TOTAL ALL INCOME</b>		<b>TOTAL ALL EXPENSES</b>	

Federal Income Tax Return has been Filed Through \_\_\_\_\_ Any Additional Assessments? \_\_\_\_\_

CONTINGENT LIABILITIES		
Nature of Liability	Description	Amount
Liabilities as Endorser, Co-Maker or Guarantor		
Liabilities on Leases and Contracts		
Liabilities on Letters of Credit		
Contested Tax Liens		
Involvement in Pending Legal Actions		

**SUPPORTING SCHEDULES (ATTACH ADDITIONAL SCHEDULES AS NEEDED)**

**SCHEDULE A: CASH IN FINANCIAL INSTITUTIONS AND MONEY MARKET ACCOUNTS**

Name of Financial Institution	Account in the Name Of:	Type of Acct	Acct Number	Balance

**SCHEDULE B: NOTES OR ACCOUNTS DUE ME**

Orig. Amt.	Due From	Balance	Pmt Sched.	Maturity	Collateral

**SCHEDULE C: STOCKS AND BONDS**

Issuing Company	Registered In the Name Of:	#Shares or Face Amt	\$Per Share	Total Value	Pledged?

**SCHEDULE D: PARTNERSHIP/PROPRIETORSHIP INTERESTS**

% of Ownership	Name of Entity	Original Cost	Present Value	If Pledged, To Whom?

**SCHEDULE E: LIFE INSURANCE**

Face Amt	Insurance Company	Policy Owner	Beneficiary	Type of Policy	Face Amt	Policy Loans

**SCHEDULE F: OIL AND GAS INTERESTS**

Legal Description	WI/RI	Net Interest	Mo Income	Mo Expense	Present Value	Purchaser of Product

**SCHEDULE G: VESTED PENSIONS, RETIREMENT FUNDS, IRA, KEOUGH**

**SCHEDULE H: OTHER PERSONAL ASSETS**

Description	Amount	Description	Amount

**SCHEDULE I: REAL ESTATE OWNED (✓ Indicates Homestead)**

Parcel Num.	Locations and Description of Improvements	✓	Years Acquired	Appraisal			Name of Title Holder
				By Whom	Date	Amount	
1.							
2.							
3.							
4.							
5.							

Parcel Num.	Mortgage or Lien	Mortgage Payable To:	Original Amount	Present Balance	Interest Rate	Payment Amount	Amount of Insurance
1.	1 <sup>st</sup>						
	2 <sup>nd</sup>						
2.	1st						
	2nd						
3.	1st						
	2nd						
4.	1st						
	2nd						
5.	1st						
	2nd						

**SCHEDULE J: NOTES PAYABLE**

Due to Whom:	Amount	How payable	Maturity	Collateral Pledged

**SCHEDULE K: OTHER ACCOUNTS AND BILLS PAYABLE INCLUDING AMOUNTS DUE BROKERS**

Due to Whom:	Amount	How payable	Maturity	Collateral Pledged

**SCHEDULE L: BUSINESSES IN WHICH UNDERSIGNED IS A PRINCIPAL OR PARTNER**

Name of Business	Type	% Ownership	Position/Title	Financial Institution

Has the Undersigned been involved in bankruptcy proceedings during the past ten years? \_\_\_ Yes \_\_\_ No  
 If yes, please state details: \_\_\_\_\_  
 Marital Status (Do not complete if applying for individual unsecured credit) \_\_\_ Married \_\_\_ Separated \_\_\_ Unmarried  
 Number of Dependents \_\_\_\_\_

*This Financial Statement, supporting schedules and information are submitted by the Undersigned to the American Heritage Bank (AHB) for the purpose of establishing, obtaining, or maintaining credit. It is a true, complete, and correct representation of the Undersigned's financial condition as of the date shown above. AHB is authorized by the Undersigned to check credit and employment history, to verify the accuracy of the information contained herein, and to answer questions about its credit experience with the Undersigned.*

\_\_\_\_\_  
 Signature Date Signature Date  
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