

Personal finance statement form

Thank you for contacting us regarding your current financial situation. Please provide the details requested below so we can better understand and find ways to support you.

Member information

Name (First)

(Middle)

(Last)

Member number

Personal financial statement

You will need to provide documentation to verify the income or assets listed below.

Income

Your monthly income \$

Other monthly household income
(from spouse or another household member) \$

Rental income \$

Investment income \$

Total income \$

Assets

Savings accounts \$

Retirement accounts \$

Investment accounts \$

Real estate \$

Other assets: \$

Total assets \$

Personal financial statement (continued)

Expenses

Total monthly housing costs (including mortgage/rent, utilities, taxes, etc.)	\$
Total monthly transportation costs (including vehicle loan payment, fuel, repair, etc.)	\$
Total monthly education/childcare costs	\$
Total monthly insurance costs (including home, vehicle, life, medical, etc.)	\$
Total monthly financial assistance provided to other people (parents, children, etc.)	\$
Other monthly expenses:	\$
Total expenses	\$

Loan payments

Monthly loan payments payable to any lender other than UNFCU (excluding mortgage if listed above)	\$
Monthly loan payments payable to any other person (family, friends, etc.)	\$
Total loan payments	\$

Acknowledgement

I acknowledge and confirm the following information:

- Everything I have stated in this form is accurate and true to the best of my knowledge.
- I have provided all requested information, including all requested debts, within this form. Failure to do so may result in a delay or denial of my request.
- It is a crime to deliberately provide incomplete or incorrect information on loan applications made to federal credit unions insured by the NCUA, such as UNFCU.

Primary applicant signature

Co-applicant signature

Date (DD Month YYYY)