

# Autumnwood Financial Corporation

100 North Main Street, PO Box 947  
Walworth, Wisconsin 53184  
(262) 275-6808  
(262) 275-5465 Fax

## Personal Financial Statement

**To:** Mr. Thomas J. Connelly, President

**Date:** \_\_\_\_\_

*If I have any questions regarding the completion of this form, I should contact my representative. I may apply for a credit extension alone or together with someone else. However, I understand that this statement is to be filled in completely and duly executed by me and my spouse (if married). If there are multiple partners involved in the transaction, I understand that separate Personal Financial Statements must be submitted to support the credit application.*

### APPLICANT

Name		Social Security Number	
Address			
Telephone Number	(      )	Date of Birth	
Present Employer			
Address		Position	
Business Phone	(      )		

### SPOUSE

Name		Social Security Number	
Address			
Telephone Number	(      )	Date of Birth	
Present Employer			
Address		Position	
Business Phone	(      )		

# AUTUMNWOOD FINANCIAL CORPORATION

<b>DATE OF VALUATION:</b>				<ul style="list-style-type: none"> <li>Round all amounts to the nearest \$100</li> <li>Attach separate sheet if you need more space to complete detail schedule</li> </ul>			
ASSETS (assets you own)	AMOUNT			LIABILITIES (debt you owe)	AMOUNT		
Cash in this bank: Checking				Loans payable to banks (schedule 7)			
Savings				Loans payable to others (schedule 7)			
C.D.'s				Installment contracts payable (schedule 7)			
IRA				Amounts due to dept. stores and others			
Cash in other banks				Credit cards (MasterCard, Visa & others)			
Due from friends, relatives and others (schedule 1)				Income taxes payable			
Mortgage and contracts for deed owned (schedule 2)				Other taxes payable			
Securities owned (schedule 3)							
Cash surrender value of life insurance (schedule 4)				Loans on life insurance (schedule 4)			
Homestead (schedule 5)							
Other real estate owned (schedule 5)				Mortgage on homestead (schedule 6)			
Automobiles (year, make, model)				Mortgage or liens on other real estate			
				Owned (schedule 6)			
				Contracts for deed (schedule 6)			
Personal property							
				Other liabilities (detail)			
Other assets (detail)							
				TOTAL LIABILITIES			
				Net Worth (total assets less total liabilities)			
<b>TOTAL</b>				<b>TOTAL</b>			

ANNUAL INCOME	APPLICANT	SPOUSE	CONTINGENT LIABILITIES	AMOUNT
Salary			As endorser	
Commissions			As guarantor	
Dividends			Lawsuits	
Interest			For taxes	
Rentals			For Leases:	
Alimony, child support or maintenance (you need not show this unless you wish us to consider it)			Lease 1	
			Lease 2	
			Lease 3	
			Lease 4	
			Other (detail)	
Other				
			<input type="checkbox"/> Check here if "none"	
<b>TOTAL INCOME</b>			<b>TOTAL CONTINGENT LIABILITIES</b>	

### SCHEDULE 1 DUE FROM FRIENDS, RELATIVES AND OTHERS

NAME OF DEBTOR	OWED TO	COLLATERAL	HOW PAYABLE	MATURITY DATE	UNPAID BALANCE
			\$ per		
			\$ per		
			\$ per		
<b>TOTAL</b>					

### SCHEDULE 2 MORTGAGE AND CONTRACTS FOR DEED OWNED

NAME OF DEBTOR	TYPE OF PROPERTY	1st OR 2nd LIEN	OWED TO	HOW PAYABLE	UNPAID BALANCE
				\$ per	
				\$ per	
				\$ per	
				\$ per	
<b>TOTAL</b>					

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DATE OF EVALUATION:

SCHEDULE 3 SECURITIES OWNED									
NO. SHARES OR BOND AMOUNT	DESCRIPTION	IN WHOSE NAME (S) REGISTERED	COST			PRESENT MARKET VALUE			L-LISTED U-UNLISTED
<b>TOTAL</b>									

SCHEDULE 4 LIFE INSURANCE									
INSURED	INSURANCE COMPANY	BENEFICIARY	FACE VALUE OF POLICY	CASH VALUE			LOANS		
<b>TOTAL</b>									

SCHEDULE 5 REAL ESTATE									
ADDRESS AND TYPE OF PROPERTY	TITLE IN NAME (S) OF	MONTHLY INCOME	COST YEAR ACQUIRED		PRESENT MARKET VALUE			AMOUNT OF INSURANCE	
Homestead			\$						
			Year						
			\$						
			Year						
			\$						
			Year						
			\$						
			Year						
			\$						
			Year						
			\$						
			Year						

SCHEDULE 6 MORTGAGE OR LIENS ON REAL ESTATE									
TO WHOM PAYABLE	HOW PAYABLE		INTEREST RATE	MATURITY DATE	UNPAID BALANCE				
Homestead	\$	per							
	\$	per							
	\$	per							
	\$	per							
	\$	per							

SCHEDULE 7 LOANS PAYABLE TO BANKS & OTHERS INSTALLMENT CONTRACTS PAYABLE									
TO WHOM PAYABLE	ADDRESS	COLLATERAL OR UNSECURED	HOW PAYABLE	MATURITY DATE	UNPAID BALANCE				
			\$ per						
			\$ per						
			\$ per						
			\$ per						
			\$ per						
			\$ per						
			\$ per						

# AUTUMNWOOD FINANCIAL CORPORATION

	<u><b>Applicant</b></u>	<u><b>Spouse</b></u>
Are there any unsatisfied judgments against you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you been delayed bankrupt in the last 10 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a defendant in any pending lawsuit?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any accounts past due?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any of your assets in a trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does anyone else own an interest in the property listed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a co-maker, co-signor or guarantor on any loan contracts?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any loans or leases with us?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever applied for a loan or a lease with us?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

*The foregoing statement submitted for the purpose of obtaining credit, is true and correct in every detail and fairly shows my/our financial condition of the time indicated. I/we will give you prompt written notice of any subsequent substantial change in such financial condition occurring before discharge of my/our obligations to you. I/we understand that you will retain this personal financial statement whether or not you approve the credit in connection with which it is submitted. You are authorized to check my/our credit and employment history or any other information contained herein.*

**THE UNDERSIGNED CERTIFY THAT THE INFORMATION CONTAINED ON THIS  
FORM HAS BEEN CAREFULLY REVIEWED AND THAT IT IS TRUE AND CORRECT IN ALL RESPECTS.**

\_\_\_\_\_  
Date

\_\_\_\_\_  
My Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature (if married)