

**brickyard.bank**



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Lincolnwood, IL 60712-3631  
(847) 679-2265  
Fax (847) 679-9077

## Personal Financial Information and Statement

Individual Account — (Complete all section except B)

Joint Account — (Complete all Sections)

**We intend to apply for joint credit:**

Applicant \_\_\_\_\_ Co-Applicant \_\_\_\_\_

Initial

This financial statement  does  does not include all assets held in joint name with Co-applicant and  all  none of the assets held in co-applicant's name alone.

### Section A Information Regarding Applicant

E-Mail:

APPLICANT NAME		SOCIAL SECURITY NO.		DATE OF BIRTH	TELEPHONE NO.	
PRESENT STREET ADDRESS			CITY	STATE	ZIP CODE	YEARS THERE
EMPLOYER		POSITION		BUSINESS TELEPHONE NO.		YEARS THERE
BUSINESS STREET ADDRESS			CITY	STATE	ZIP CODE	
<b>GENERAL INFORMATION</b>	DEFENDANT IN SUITS OR LEGAL ACTIONS OR JUDGEMENTS OUTSTANDING? <input type="checkbox"/> YES <input type="checkbox"/> NO (if yes, explain)					
	NO. OF DEPENDENTS	DATE OF YOUR WILL	EXECUTOR			
	HAVE ANY OF YOUR DEBTS EVER BEEN DISCHARGED, SATISFIED OR SETTLED UNDER THE BANKRUPTCY ACT? <input type="checkbox"/> YES <input type="checkbox"/> NO (if yes, explain)					

### Section B Information Regarding Co-Applicant

E-Mail:

APPLICANT NAME		SOCIAL SECURITY NO.		DATE OF BIRTH	TELEPHONE NO.	
PRESENT STREET ADDRESS			CITY	STATE	ZIP CODE	YEARS THERE
EMPLOYER		POSITION		BUSINESS TELEPHONE NO.		YEARS THERE
BUSINESS STREET ADDRESS			CITY	STATE	ZIP CODE	
<b>GENERAL INFORMATION</b>	DEFENDANT IN SUITS OR LEGAL ACTIONS OR JUDGEMENTS OUTSTANDING? <input type="checkbox"/> YES <input type="checkbox"/> NO (if yes, explain)					
	NO. OF DEPENDENTS	DATE OF YOUR WILL	EXECUTOR			
	HAVE ANY OF YOUR DEBTS EVER BEEN DISCHARGED, SATISFIED OR SETTLED UNDER THE BANKRUPTCY ACT? <input type="checkbox"/> YES <input type="checkbox"/> NO (if yes, explain)					

**Schedule A Cash, Checking Accounts, Savings Accounts, and Certificates of Deposit**

TYPE	NAME OF FINANCIAL INSTITUTION	AMOUNT	IN NAME OF	PLEDGED

**Schedule B—Marketable Securities**

NO. OF SHARES OR PAR VALUE OF BONDS, NOTES AND BILLS	EXCHANGE	DESCRIPTION	IN NAME(S) OF	MARKET VALUE	ARE THESE SECURITIES PLEDGED

**Schedule C—Non-Marketable Securities, Notes and Receivables—Restricted or Control Stocks**

DESCRIPTION OF SECURITIES OR NAME OF BORROWER	IN NAME(S) OF	IF EQUITY SECURITIES		IF NOTES OR RECEIVABLES INDICATE WHETHER SECURED OR UNSECURED	BOOK VALUE OF EQUITY SECURITIES (Indicate Date) OR AMOUNT OF LOAN (Indicate Maturity)		ARE THESE SECURITIES AND RECEIVABLES PLEDGED?
		NUMBER OF SHARES OWNED	% OWNERSHIP				

**Schedule D—Life Insurance Carried, Including Group Insurance**

AMOUNT	NAME(S) OF INDIVIDUALS COVERED	OWNER OF THE POLICY	NAME OF ISSUING COMPANY	BENEFICIARY	CASH SURRENDER VALUE	POLICY LOANS FROM ISSUING CO.

**Schedule E—Real Estate Used as Personal Residence**

PROPERTY DESCRIPTION AND LOCATION	TITLE IN NAME(S) OF	DATE ACQUIRED	MARKET VALUE	COST	MORTGAGE	
					AMOUNT	MATURITY

**Schedule F—Real Estate Not Used as Personal Residence**

PROPERTY DESCRIPTION AND LOCATION	DATE ACQUIRED	% OWNED	TITLE IN NAME(S) OF	COST OF ENTIRE PROPERTY	APPRAISED MARKET VALUE OF ENTIRE PROPERTY	BALANCE OF MORTGAGE OR OTHER DEBT AGAINST PROPERTY	MARKET VALUE OF YOUR OWNERSHIP INTEREST	IF COMMERCIAL REAL ESTATE		LIABILITY	
								ANNUAL NET OPERATIONS INCOME	ANNUAL DEPRECIATION	DIRECT	GUARANTOR

**Statement of Assets and Liabilities**

As of \_\_\_\_\_

ASSETS	IN EVEN DOLLARS	LIABILITIES	IN EVEN DOLLARS
Cash and Deposits — See Schedule A		Notes Payable — Banks Please Enter Amount:	
Marketable Securities — Securities Held by Broker in Margin Accounts See Schedule B		Notes Payable — Others Please Enter Amount:	
Non — Marketable Securities, Notes and Receivables Restricted of Control Stocks — See Schedule C		Charge Cards Please Enter Amount:	
Cash Value Life Insurance — See Schedule D		Accounts Payable Please Enter Amount:	
Real Estate Used as Personal Residence at Market Value — See Schedule E		Unpaid Income Tax Please Enter Amount:	
Real Estate Not Used as Personal Residence at Market Value — See Schedule F		Installment Loans Please Enter Amount:	
		Real Estate Mortgages Payable On Real Estate Used as Personal Residence See Schedule E	
		Real Estate Mortgages Payable On Real Estate Not Used as Personal Residence See Schedule F	
Automobiles and Other Personal Property		Other Obligations — Itemize Description:	Amount:
Other Assets (List):	Amount:		
		Total Liabilities	
		Net Worth	
<b>Total Assets</b>		Total Liabilities and Net Worth	

