

**Information Summary**

PRIMARY APPLICANT		
FIRST NAME	MIDDLE INITIAL	LAST NAME
SOCIAL SECURITY NUMBER		DATE OF BIRTH
CO-APPLICANT (IF ANY)		
FIRST NAME	MIDDLE INITIAL	LAST NAME
SOCIAL SECURITY NUMBER		DATE OF BIRTH
TAX LIABILITY INFORMATION		
Income tax returns are filed through:	DATE	
Are any tax returns currently being contested?	<input type="radio"/> YES <input type="radio"/> NO	
If yes, which tax return years are currently being contested?	YEARS	

**Additional Information**

LIABILITY DESCRIPTION	APPLICANT	CO-APPLICANT
Are you in the U.S. Armed Forces?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Have you or any firm in which you were a major owner ever declared bankruptcy?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Have you or any firm in which you were a major owner ever had a judgement against you?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Are any assets pledged or debts secured except as shown?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Are there any State or Federal Tax liens filed against you or any of your property?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Have you ever declared bankruptcy or defaulted on any debts?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Are you currently party to any lawsuits?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Do you have a will?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Have you ever had a financial plan prepared for you?	<input type="radio"/> YES <input type="radio"/> NO	<input type="radio"/> YES <input type="radio"/> NO
Number of Dependents		
Marital Status <sup>†</sup>	<input type="radio"/> UNMARRIED <input type="radio"/> MARRIED <input type="radio"/> SEPARATED	<input type="radio"/> UNMARRIED <input type="radio"/> MARRIED <input type="radio"/> SEPARATED

<sup>†</sup> Answer only if this financial statement is provided in connection with a request for secured credit or applicant is seeking a joint account with spouse.

**Representations and Warranties**

By signing below, the parties acknowledge and agree to each of the following:

1. All information in this form and the financial statement submitted are true and complete to the best of your knowledge and belief.
2. That neither applicant has made any misrepresentation in this application or has failed to include important information.
3. Platinum Bank has the right to verify the accuracy of the information provided.
4. Platinum Bank is authorized to obtain a Consumer Credit Report and/or check the credit rating and history of the applicant(s).
5. All supporting documentation included in this application remains the property of Platinum Bank.
6. All information provided will be kept confidential by Platinum Bank and will be used only for the purposes of considering this loan request.
7. In the event that Platinum Bank grants credit, we reserve the right to release information concerning our credit experience with the applicant.
8. I understand, acknowledge, and agree that my tax return information may be provided to and used by the Lender to evaluate credit risks in a loan made to me or guaranteed by me. Therefore, I consent to the Lender using my tax return information to underwrite the loan application and service the loan per the terms of the loan documents. I also understand that the Lender may elect to sell all or a portion of the loan to another lender. I consent to the sharing of my tax return information with potential buyers of the loan (or portion thereof) for the purpose of evaluating the loan purchase and the servicing of the loan per the loan documents.

\_\_\_\_\_  
SIGNATURE OF PRIMARY APPLICANT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SIGNATURE OF CO-APPLICANT

\_\_\_\_\_  
DATE