

If you are attaching a separate financial statement it must be signed and dated. You are still required to complete Sections 1, 2 (if applicable) 3 and 5.

If you are applying for individual credit or if this statement relates to your guaranty of the indebtedness of other person(s), business organization(s), or corporation(s) complete all except Section 2. If you are relying on income from alimony, child support, or separate maintenance or on the income or assets of another person as a basis for repayment of the credit requested, provide information in Section 2 about the person whose alimony, support, or maintenance payments or income or assets you are relying on. Alimony, child support, or separate maintenance income, need not be revealed if you do not wish to have it considered as basis for repaying this obligation.

In all instances stated above, please sign and date this form on the bottom of the second page.

SECTION 1 - Individual Information (type or print)				SECTION 2 - Other Party Information (type or print)			
Legal Name				Legal Name			
Street Address				Street Address			
City, State & Zip				City, State & Zip			
U.S. Citizen ☐ Yes ☐ No		Resident Alien ☐ Yes ☐ No		U.S. Citizen ☐ Yes ☐ No		Resident Alien ☐ Yes ☐ No	
Social Security #				Social Security #			
Date of Birth		Email:		Date of Birth		Email:	
Occupation and Title				Occupation and Title			
Employer Name				Employer Name			
Employer Address				Employer Address			
City, State & Zip				City, State & Zip			
Years employed in this line of work/profession				Years employed in this line of work/profession			
Phone	Res.	Bus.	Mobile	Phone	Res.	Bus.	Mobile
Do you have a trust? ☐ Yes ☐ No				Do you have a trust? ☐ Yes ☐ No			
SECTION 3 - Annual Income For Year Ended _____, _____							
Annual Income		Individual	Joint	Annual Expenditures		Individual	Joint
Salary, bonuses & commissions				Mortgage/rental payments		\$	
Dividends & Interest				Real estate taxes & assessments			
Real Estate Income				Taxes - federal, state & local			
Other Income - (alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.)				Insurance payments			
				Other contract payments (car payments, charge cards, etc.)			
				Alimony, child support, maintenance			
				Other expenses			
Total Income		\$ 0.00	0.00	Total Expenditures		\$ 0.00	0.00
SECTION 4 - State of Financial Condition as of _____, _____							
Contingent Liabilities Estimated Amounts			Yes	No	Individual		Joint
Contingent liabilities as endorser, co-maker or guarantor?			☐	☐			
On leases? On contracts?			☐	☐			
Involvement in pending legal actions?			☐	☐			
Contested income tax liens?			☐	☐			
Any estimated capital gains tax on unrealized asset appreciation?			☐	☐			
Other special debt or circumstances?			☐	☐			
If "yes" to any question(s) describe:							
				Total Contingent Liabilities		\$ 0.00	0.00
SECTION 5 – Declarations							
Have (either of) you or any business organization in which you were a major (greater than 20%) owner ever declared bankruptcy, or settled any debts for less than the amounts owed?							
Are (either of) you a defendant in any suit or legal action?							
Are (either of) you presently subject to any unsatisfied judgements or tax liens?							
Have (either of) you been audited by IRS? If yes, date of audit ____/____/____							

SECTION 6 – Schedules									
SCHEDULE A - Cash, Checking And Savings Accounts, Certificates Of Deposit, Money Market Funds, Etc.									
Name of Financial Institution		Type of Account	Owner		J	If Pledged, to Whom?		Balance	
SCHEDULE B - U.S. Government & Marketable Securities (Use additional sheet if necessary)									
Number of Shares or Face Value of Bonds		Description	In Name of		Are these Registered, Pledged, or Held by Others?		Market Value	Exchanges Where Traded	
SCHEDULE C - Non-Marketable Securities (Use additional sheet if necessary)									
Number of Shares		Description	In Name of		Are these Registered, Pledged, or Held by Others?		Value	Exchanges Where Traded	
SCHEDULE D - Investments In Real Estate (Use additional sheet if necessary)									
Description/Location of Real Estate Investment		(J)	Date of Original Investment/Amount	% Owned By You	Market Value of Your % of Investment	Present Balance	Monthly Payment	Mortgage Maturity Date	Mortgage Owed To
SCHEDULE E - Life Insurance Carried, Including Group Insurance									
Name of Insurance Company		Owner of Policy		Beneficiary and Relationship		Face Amount	Policy Loans		Cash Surrender Value
SCHEDULE F - Vested Interest In Deferred Compensation/Profit-Sharing Plans									
% Vested	Company Name		Account Number	Manner of Payout (Annuity, Lump Sump, etc.)		Distribution Date	Beneficiary		Amount
SCHEDULE G - Business Ventures (Use additional sheets if necessary)									
List Name and Address of Any Business Venture In Which You are A Principal or Partner		Your Position/ Title in The Business		Line of Business	Years in Business	Total Assets Listed in Section 4	Your % of Ownership	Net Worth of Business	Present Net Value of Your Investment
SCHEDULE H - Loans Owing Banks, Brokers, Finance Companies, And Others (MASTERCARD, VISA, Etc.)									
Owing to (Acct. No.)	(J)	Date of Original Borrowing/Amount		Present Balance	Due	Monthly Payment	Date of Final Pay't	Secured by	

CONSENT

Each of the undersigned represents, warrants, and certifies that (1) the information provided herein is true, correct and complete and gives a correct and complete showing of the financial condition of the undersigned, (2) the undersigned has no direct, indirect or contingent liabilities except as set forth in this statement, and (3) legal and equitable title to all assets listed herein is in the undersigned's sole name, except as may be herein otherwise noted. Each of the undersigned agrees to notify you immediately and in writing of any change in name, address, or employment and of any material adverse change (1) in any of the information contained in this statement or (2) in the financial condition of any of the undersigned or (3) in the ability of any of the undersigned to perform its (or their) obligations to you.

I hereby authorize ENTERPRISE BANK & TRUST (the "Bank") to obtain a consumer report or a credit report (a "Report") on me personally with respect to any Loan in which I am the Borrower, or a principal of the Borrower, or a guarantor of the Loan. Such Reports may include personal financial, employment and credit information. The Bank is authorized to make all inquiries it deems necessary, either directly or through any agency employed by the Bank for that purpose, to verify the accuracy of the information contained herein and to determine my credit worthiness. The Bank may disclose any Report to any other person or institution who obtains any interest in any Loan. The Bank may use the following Consent with respect to any new applications for credit that I may make to the Bank without getting additional approval from me.

I hereby agree that ENTERPRISE BANK & TRUST (the "Bank"), or any employee, agent or representative of the Bank, may verify all of the information given or credit references. I hereby authorize any person or company in possession of any such record(s) or information to rely on a photocopy or fax of this Consent and to release such records to the Bank.

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT

To help the government fight the funding of terrorism and money laundering activities, Federal Law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. **What this means for you:** When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver’s license or other identifying documents.

Date signed _____, 20____Signature (individual) _____

Date signed _____, 20____Signature (other party) _____