## TRUIST H

## **Personal Financial Statement**

Section 1: Applicant Inf	ormation			Section 2: Co-Applica	Int Information	tion*			
Name				Name					
Date of Birth	ate of Birth Social Security Numb			Date of Birth Social Security Number					
Residence Address				Residence Address		-			
City		State	Zip	City S		State		Zip	
Position/Occupation			Number of Years	Position/Occupation			1	Number of Years	
Employer Name				Employer Name					
Telephone				Telephone					
Home: Work: Cell:			ll:	Home:	Work:		Cell:		
Email Address				Email Address					
Nearest Relative Not Living With Me Relationship		Telephone	Nearest Relative Not Living With Me         Relationship         Telephone						
Address				Address					
City		State	Zip	City		State		Zip	
Driver's License/ID Number	Expiration Da	ate Date Issued	State Issued	Driver's License/ID Numbe	er Expira	tion Date	Date Issued	State Issued	
				*When completed and	signed den	otes vour in	tent to apply	for joint credit	

Section 3: Statement of Financial Condition	n					
BALANCE SHEET AS OF: (mm/dd/yyyy)						
Indicate "A" (Applicant), "C" (Co-Appli	cant), or "J" (Jo	pintly Held With Others)	in column next to assets and liabilities listed to indicate	to whom item a	pplies.	
ASSETS A, C or J Dollar Amount LIABILI			LIABILITIES	A, C or J	Dollar Amount	
Cash on Hand and In Banks (Schedule A)			Secured Notes Payable to Banks (Schedule E)			
IRAs, 401(k), Retirement Assets		Unsecured Notes Payable to Banks (Schedule E)				
U.S. Gov't, Marketable Securities (Schedule B)			Due to Brokers, Margin Loans (Schedule E)			
Securities Held By Broker in Margin Accounts			Amounts Payable To Others (Secured)			
Restricted/Control Stocks (Public Company Only)			Credit Cards (Schedule E)			
Real Estate Owned (Schedule C)			Equity Lines (Schedule E)			
Loans Receivable			Unpaid Taxes (Income, Property, etc.)			
Life Insurance Cash Value (Schedule D)			Real Estate Mortgages Payable (Schedule C)			
Value of Closely Held Business			Other Debts (itemize)			
Vehicles/Other Personal Property						
Other Assets (itemize)						
			TOTAL LIABILITIES	•	\$0.00	
			NET WORTH		\$0.00	
TOTAL ASSETS			TOTAL: LIABILITIES AND NET WORTH		\$0.00	

INCOME & EXPENSE STATEMENT FOR THE YEAR ENDED:			(mm/dd/yyyy)		
INCOME Applicant C		Co-Applicant	EXPENSES		
Salary			Rent (Payment)		
Bonuses and Commissions			Alimony		
Interest and Dividends			Child Support		
Rental Income			Tuition		
Other Income (Alimony/child support need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.)			PERSONAL INFORMATION (Both Applicant and Co-Applicant)         Are you a U.S. Citizen?       Yes       No		
TOTAL INCOME CONTINGENT LIABILITIES	\$0.00	\$0.00	Are you an officer or an immediate family member/dependent of an officer of a Truist Financial Corporation controlled entity?		
Do you have contingent liabilities or required capital contributions? If Yes, describe:			Do you have a will?  Yes No If Yes Executor Name:		
			Are you a partner or officer in another venture? Yes No If Yes, Describe:		
			Income tax settled through (date)		
As endorser, co-maker or guarantor?			Are any assets pledged other than as described on schedules? Set Yes No If Yes,		
On leases or contracts?			Describe:		
Legal claims			Are you or a non-publicly traded business in which you hold an ownership interest a defendant in any suits or legal actions?  Yes No If Yes,		
Other special debt			Describe:		
Amount of contested income tax liens			Have you or your businesses ever been declared bankrupt?  Yes  No		

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## COMPLETE THE SCHEDULES ON THE NEXT PAGE AND PROVIDE SIGNATURE

SCHEDULE A: Cas	h and Investn	nents				-						-			
Account Type		Bank/Broker Name			In Name Of					Pledged?			rrent Balance		
											Yes 🛛	No			
												Yes 🛛	No		
												Yes 🛛	No		
												Yes 🛛	No		
											Yes No				
												Yes 🛛	No		
		•										тот			\$0.00
SCHEDULE B: U.S	. Government	and Ma	rketable	e Securi	ties										
Number of Shares Description					me Of		Pled	ged?	D	ate of Val	ue		Value		
								Yes	🗆 No						
							Yes	🗆 No							
									Yes						
									☐ Yes						
												TOT	TAL		\$0.00
SCHEDULE C: Rea	I Estate Owne	ed (Note:	An adde	ndum to	Schedule	C is availa	ble if additio	onal snace	e is neede	d)					
	SCHEDULE C: Real Estate Owned (Note: An addendum to Schedule C is available if additional space is needed) (2) Property Description														
(1) Property Address		Ty	pe: Comn	nercial (C),	Residentia	(R), Agricult	ural (A).	(3)			(4)		(5)		
		Use: Home, Lot, Office, Rental, Wa Size: Square Footage.			arehouse.		Cost		Da	Date Acquired		Current Market Value			
		Туре		Use	Size										
1											_				
2 3											_				
4															
5															
6															
Sub-Total (from Schedule C Addendum) GRAND TOTAL \$0.00															
									G		OTAL				\$0.00
(6) (7) (8) (9) (10) (11) Mortgage Monthly Monthly Rental Ownership															
Lende	r Name		Name on Title		Bala		Payment				come				
1							Bail		•	aymont					<u>%</u>
2															%
3															%
4							-								% %
5 6															%
0							Sub-Tota	l (from Sc	hedule C	Addend	um)				70
Sub-Total (from Schedule C Addendum) GRAND TOTAL \$0.00															
SCHEDULE D: Life	Insurance Ca	arried (In	cluding	y Whole	Life and	Group In	surance)								
Insurance Company			Owner			Beneficia		Face	Amount		Poli	cy Loans		Cash	Surrender Value
							-					-			
					1							тот			\$0.00
	L		- 10/1												φ <b>υ.</b> 00
SCHEDULE E: Ban	KS/Finance Co	ompanie	s Whe	e Credi	t Has Bee	en Obtain			Moximum		Manth	ly l	C	nt	
		-					Type		Maximum		Month		Curre	JII	

Some Dole L. Banksr mance companies where credit has been obtained								
Lender Name	Collateral Description	Type (Line of Credit, Term Loan)	Maximum Line Amount	Monthly Payment	Current Balance	Maturity		
		•		TOTAL	0			

It is my/our intent to apply for individual credit or joint credit with \_\_\_\_\_, or guarantee credit of another party. Therefore, each of the undersigned hereby instructs, consents and authorizes Truist Bank, or any affiliate, subsidiary or other entity related thereto ("Lender") to obtain a consumer credit report and any other information relating to their individual credit status in the following circumstances: (a) relating to the opening of an account or upon application for a loan or other product or service offered by Lender to one or more of the undersigned, or to a commercial entity of which one or more of the undersigned is a principal, member, other representative or guarantor, (b) thereafter, periodically according to the Lender's credit review and audit procedures, and (c) relating to Lender's review or collection of a loan, account, or other Lender product or service made or extended to a commercial entity of which the undersigned is a principal, member, other representative or guarantor.

Each of the undersigned certify that everything stated on the first page and second page of this Personal Financial Statement and any other documents or information submitted in connection with this Personal Financial Statement is true, accurate and complete as of (i) the date(s) indicated in Section 3 or (ii) if no date(s) are indicated in Section 3, as of the date(s) this Personal Financial Statement is signed by the undersigned. Each of the undersigned understands that Lender will retain this Personal Financial Statement. Each of the undersigned hereby authorize Lender to verify at any time any information submitted to Lender by or on behalf of the undersigned; obtain further information concerning the credit standing of the undersigned, including without limitation, credit and employment history; and exchange credit information concerning the undersigned with other individuals or entities, including, without limitation, any affiliate, subsidiary or other entity related to Truist Bank. Each of the undersigned authorize Lender to consider this Personal Financial Statement or until the undersigned specifically notifies Lender in writing of any change in such financial condition. A signed counterpart of this Personal Financial Statement transmitted via facsimile, pdf or other electronic means shall be as fully enforceable as the counterpart containing the original signature(s) of the undersigned.

This Personal Financial Statement, including the consent to obtain consumer credit report contained above is executed by each of the undersigned(s) on the date(s) listed below.

Applicant Signature	(Required)

Print Name

Co-Applicant Signature (Required if Section 2 is Completed)

Date Signed

Print Name

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