

**PERSONAL FINANCIAL STATEMENT**

**COASTAL  
FINANCIAL CORP.**  
*"The Boat Loan Source"*

**24-HOUR LOAN PROCESSING CENTER**  
**194 S. RIVER AVE. SUITE 1**  
**HOLLAND, MI 49423**

**TEL (616) 494-2628 • FAX (616) 494-2629**

**PLEASE ATTACH:**

1. APPLICATION & PERSONAL FINANCIAL STATEMENT
2. LAST TWO YEARS PERSONAL FEDERAL TAX RETURNS (thru Sch. E)
3. IF SELF EMPLOYED, LAST TWO YEARS CORPORATE TAX RETURNS
4. WHEN AVAILABLE - PURCHASE AGREEMENT

**CASH ON HAND AND IN BANK**

**ASSETS**

Bank	Amount
Deposit on Boat Being Purchased	\$

TOTAL \$ \_\_\_\_\_

**STOCKS AND SECURITIES**

Broker Company/Stocks/Mutual Funds	Amount

TOTAL \$ \_\_\_\_\_

**RETIREMENT ACCOUNTS**

Where Held?	Amount
IRA(s)	
401K	
Keogh	
Other	

TOTAL \$ \_\_\_\_\_

**LIFE INSURANCE** Company Name \_\_\_\_\_

Face Amount \$	Cash Surrender Value Total \$
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**REAL ESTATE**

Address	Year Purchased	Market Value	Mortgage Holder	Monthly Rental Income	Monthly Payment	Balances Outstanding

TOTAL \$ \_\_\_\_\_

TOTAL BALANCES \$ \_\_\_\_\_

**AUTOMOBILES/BOATS**

Type/Year & Model	Current Value	Lender Name	Monthly Payment	Balance Outstanding

TOTAL \$ \_\_\_\_\_

TOTAL BALANCES \$ \_\_\_\_\_

OTHER ASSETS and/or PRIVATELY HELD COMPANY	Current Value	OTHER LIABILITIES	Monthly Payment	Balance Outstanding
Personal Property		Type Bank or Lender		
Privately Held Company Name				

TOTAL \$ \_\_\_\_\_

TOTAL BALANCES \$ \_\_\_\_\_

**TOTAL ASSETS \$ \_\_\_\_\_ - TOTAL LIABILITIES \$ \_\_\_\_\_ = NET WORTH \$ \_\_\_\_\_**

I/We make this statement of all my/our assets and liabilities. This is accurate to the best of my/our knowledge for the purpose of obtaining credit through Coastal Financial

Signature of Applicant \_\_\_\_\_

Date \_\_\_\_\_

Signature of Co-Applicant \_\_\_\_\_

Date \_\_\_\_\_