

**PERSONAL FINANCIAL STATEMENT**

**IMPORTANT: Read these directions before completing this statement**

- If you are applying for **individual credit** in your own name and are relying on your own income or another person as the basis for repayment of the credit requested, complete only Sections 1 and 3.
- If you are applying for **joint credit** with another person, complete ALL sections providing information in Section 2 about the joint application.
- If you are applying for individual credit, but are **relying on income from alimony, child support, or separate maintenance of on the income or assets of another person as a basis for repayment of the credit requested**, complete ALL sections, providing information in Section 2 about the person whose alimony, support or maintenance payments or income or assets you are relying on.
- If this statement relates to your **guaranty of the indebtedness of other person(s), firm(s), or corporation(s)**, complete Sections 1 and 3.

**To: Coastal Realty Capital, LLC D.B.A. Maine Capital Group**

SECTION 1 – INDIVIDUAL INFORMATION (Type or Print)		SECTION 2- OTHER PARTY INFORMATION (Type or Print)	
Name		Name	
Residence Address		Residence Address	
City, State, Zip		City, State, Zip	
Position or Occupation		Position or Occupation	
Business Name		Business Name	
Business Address		Business Address	
City, State, Zip		City, State, Zip	
Res. Phone	Bus. Phone	Res. Phone	Bus. Phone

SECTION 3 – STATEMENT OF FINANCIAL CONDITION AS OF _____, 20____				
ASSETS <small>(Do not include Assets of doubtful value)</small>		In Dollars (Omit Cents)	Liabilities	In Dollars (Omit Cents)
Cash on hand and in banks			Notes payable to banks – secured	
U.S. Gov't & Marketable Securities – see Schedule A			Notes payable to banks – unsecured	
Non-marketable Securities – see Schedule B			Due to brokers	
Securities held by broker in margin accounts			Amounts payable to others – secured	
Restricted or control stocks			Amounts payable to others - unsecured	
Real Estate owned as personal residence See Schedule C			Accounts and bills due	
Real Estate owned for investment purposes See Schedule D (attached)			Unpaid income taxes and interest	
Loans receivable			Real estate owned as personal residence	
Automobiles and other personal property			Mortgages payable – see Schedule C	
Cash value life insurance – see Schedule E			Real estate owned for investment purposes	
Other assets – itemize			mortgages payable – see Schedule D	
			Credit card/revolving debt	
			Other debts – itemized	
			<b>TOTAL LIABILITIES</b>	
<b>TOTAL ASSETS</b>			<b>NET WORTH = ASSETS – LIABILITIES</b>	
			<b>TOTAL LIABILITIES &amp; NET WORTH</b>	

SOURCES OF INCOME FOR YEAR ENDED _____ 20____	PERSONAL INFORMATION
Salary, bonuses & commissions \$	Do you have a will? <input type="checkbox"/> No <input type="checkbox"/> Yes if yes, name of executor
Dividends	
Net real estate income	Are you a partner or officer in any other venture? If so describe
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)	Are you obligated to pay alimony child support or separate maintenance payments? If so, describe
	Are any assets pledged other than as described on schedules? If so, describe
<b>TOTAL \$</b>	
<b>CONTINGENT LIABILITIES</b>	
Do you have any contingent liabilities? If so, describe	Income tax settled through (date) _____
	Are you a defendant in any suits or legal actions?
As endorser, co-maker or guarantor \$	Personal bank accounts carried at
On leases or contracts \$	
Legal claims \$	
Other special debt \$	Have you ever been declared bankrupt? If so, describe
Amount of contested income tax liens \$	

**SCHEDULE A – U.S. GOVERNMENTS AND MARKETABLE SECURITIES**

Number of Shares of Face Value (Bonds)	Description	In Name Of	Are These Pledged?	Market Value

**SCHEDULE B – NON-MARKETABLE SECURITIES**

Number of Shares	Description	In Name Of	Are These Pledged?	Source of Value	Value

**SCHEDULE C – REAL ESTATE OWNED: A PERSONAL RESIDENCE**

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Rental Income	Mortgage Amount

**SCHEDULE D – REAL ESTATE OWNED FOR INVESTMENT PURPOSES**

Address & Type Of Property	Title In Name Of	% Of Ownership	Date Acquired	Cost	Market Value	Rental Income	Mortgage Amount

**SCHEDULE E – LIFE INSURANCE CARRIED, INCLUDING N.S.L.I. AND GROUP INSURANCE**

Name of Insurance Company	Owner of Policy	Beneficiary	Face Amount	Policy Loans	Cash Surrender Value

**SCHEDULE F – BANKS OR FINANCE COMPANIES WHERE CREDIT HAS BEEN OBTAINED**

Name & Address of Lender	Credit In The Name Of	Secured Or Unsecured	Original Date	High Credit	Current Balance

The information contained in this statement is provided for the purpose of obtaining or maintaining credit with MCG on behalf of the undersigned or persons, firms or corporations in whose behalf the undersigned may either severally or jointly with others, execute a guaranty in MCG's favor. Each undersigned understands that MCG is relying on the information provided herein (including the designation made as to ownership of property) in deciding to grant or continue credit. Each undersigned represents and warrants **that the information provided is true and complete** and that MCG may consider this statement as continuing to be true and correct until a written notice of a change is given to MCG by the undersigned. MCG is authorized to make all inquiries deemed necessary to verify the accuracy of the statements made herein, and to determine my/our creditworthiness. MCG is authorized to answer questions about its credit experience with me/us.

**Signature** (Individual) \_\_\_\_\_

S.S. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

**Signature** (Other party) \_\_\_\_\_

S.S. No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Date Signed \_\_\_\_\_