

**LOAN APPLICATION**

- Complete and signed
- Please be sure all parties apply that wish to be part of the ownership of the boat
- Copies of driver's license or passport for each applicant

**PERSONAL FINANCIAL STATEMENT**

- Completed and Signed. Current within 30 days.
- If you have a current PFS already prepared, please send in lieu of the one attached.

**PROOF OF LIQUID ASSETS**

- Current statements (within 30 days) for checking, savings, brokerage, money market, retirement, etc.

**PERSONAL TAX RETURNS**

- Last 2 years complete personal 1040 tax returns including all schedules

**PAYSTUBS (IF APPLICABLE)**

- Current within 30 days

**SELF-EMPLOYED APPLICANTS**

- Last 2 years corporate 1120 or 1120S Tax Returns including all schedules particularly schedule K1 (if applicable)
- Interim year-to-date financials (balance sheet and profit/loss statement). These do not need to be formal or audited financials - just simple Quickbook documents will suffice.

**\*\* ADDITIONAL ITEMS THAT MAY BE REQUIRED**

- If the boat is pre-owned, the lender may require a survey to be performed by a NAMS or SAMS certified surveyor to verify the condition and to ensure the purchase price is supported. \*\*It is always recommended to schedule the survey after your finance approval is in place.
- Any other items as requested by lender

*Please submit all items directly to our Finance Manager, Dana Galvao. A secure link for submitting these items will be provided to you via email.*

*Thank you for trusting Galati Yacht Sales with your financing.*

**Galati Yacht Sales Finance Office**

12030 N. Gandy Blvd  
St. Petersburg, FL 33702

Ph: (727) 576-8336  
Fax: (727) 828-0192

Dana Galvao  
dgalvao@galatiyachts.com  
(727) 643-6440



# Galati Yacht Sales Financing

## PERSONAL FINANCIAL STATEMENT



Personal Financial Statement Of: \_\_\_\_\_ As of \_\_\_\_\_

### ASSETS

#### CASH ON HAND AND IN BANKS

Name / Description / Bank	Personal	Business	Amount
_____			\$ _____
_____			\$ _____
_____			\$ _____
_____			\$ _____
<b>Total</b>			\$ _____

#### STOCKS AND SECURITIES / BROKERAGE ACCOUNTS

Name / Description	Value	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
<b>Total</b>		\$ _____

#### RETIREMENT ACCOUNTS (IRA'S / 401K, ETC.)

Name / Description	Value	
_____	_____	
_____	_____	
_____	_____	
<b>Total</b>		\$ _____

#### REAL ESTATE

Address	Monthly Rental Income	Year Purchased	Market Value
_____	_____	_____	_____
_____	_____	_____	_____
<b>Total</b>			\$ _____

#### AUTOMOBILES / BOATS

Year	Make	Current Value
_____	_____	_____
_____	_____	_____
<b>Total</b>		\$ _____

#### OTHER ASSETS

Description	Current Value	
_____	_____	
_____	_____	
<b>Total</b>		\$ _____

**Total Assets** \$ \_\_\_\_\_

### LIABILITIES

#### CREDIT CARDS

Lender	Monthly Payment	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Monthly Total</b>		\$ _____

#### REAL ESTATE LOANS

Type / Lender	Monthly Payment	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
Home Equity Line	Monthly Payment	Balance
_____	_____	_____
<b>Monthly Total</b>		\$ _____

#### AUTOMOBILES / BOATS

Type / Lender	Monthly Payment	Balance
_____	_____	_____
_____	_____	_____
<b>Monthly Total</b>		\$ _____

#### OTHER LIABILITIES

Type / Lender / Description	Monthly Payment	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
<b>Monthly Total</b>		\$ _____

**Monthly Total Liabilities** \$ \_\_\_\_\_

#### FOR OFFICE USE ONLY

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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X Applicants Signature \_\_\_\_\_ Date \_\_\_\_\_

X Co-Applicants Signature \_\_\_\_\_ Date \_\_\_\_\_

If you require more room to submit your financial information, please attach a separate page.  
**NON-SPOUSAL CO APPLICANT MUST COMPLETE SEPARATE PERSONAL FINANCIAL STATEMENT.**