

CROWNING TOUCH
Senior Moving Services
 6704 Williamson Rd., NW, Roanoke, VA 24019

CONFIDENTIAL
PERSONAL FINANCIAL STATEMENT

Statement Date: _____

Personal Information

Name: _____	SSN: _____
Address: _____	DOB: _____
City, State ZIP: _____	Dependents: _____
Home Telephone: _____	Business Telephone: _____

Section I

ASSETS	LIABILITIES
Cash on Hand and in Banks _____	Notes Due to Banks _____
Cash Value of Life Insurance _____	Notes Due to Relatives & Friends _____
U.S. Government Securities _____	Notes Due to Others _____
Other Marketable Securities _____	Accounts & Bills Payable _____
Notes & Accounts Receivable - Good _____	Unpaid Income Taxes Due - Federal, State _____
Others Assets Readily Convertible to Cash - Itemize: _____	Other Unpaid Taxes & Interest _____
_____	Loans on Life Insurance Policies _____
_____	Contract Accounts Payable _____
_____	Cash Rent Owed _____
TOTAL CURRENT ASSETS _____	Other Liabilities Due Within One Year - Itemize: _____
Real Estate Owned _____	_____
Mortgages & Contracts Owned _____	TOTAL CURRENT LIABILITIES _____
Notes & Accounts Receivable - Doubtful _____	Real Estate Mortgage Payable _____
Notes from Relatives & Friends _____	Liens & Assessments Payable _____
Other Securities - Not Readily Marketable _____	Other Debts - Itemize _____
Personal Property _____	_____
Other Assets - Itemize: _____	_____
_____	TOTAL LIABILITIES _____
_____	Net Worth (Total Assets - Total Liabilities) _____
TOTAL ASSETS _____	TOTAL LIABILITIES & NET WORTH _____

ANNUAL INCOME	ESTIMATE OF ANNUAL EXPENSES
Salary, Bonuses & Commissions _____	Income Taxes _____
Dividends & Interest _____	Other Taxes _____
Rental & Lease Income (Net) _____	Insurance Premiums _____
Other Income - Itemize _____	Mortgage Payments _____
Other Person's Salary, Bonuses & Commissions _____	Rent Payable _____
Other Income of Other Persons - Itemize _____	Other Expenses _____
TOTAL _____	TOTAL _____

GENERAL INFORMATION	CONTINGENT LIABILITIES
Are your assets pledged? ___ No ___ Yes	As Endorser, Co-maker or Guarantor _____
Are you a defendant in any suits or legal actions? ___ No ___ Yes	On Leases or Contracts _____
Explain: _____	Legal Claims _____
Have you declared bankruptcy in the last 10 years? ___ No ___ Yes	Federal, State Income Taxes _____
Explain: _____	Other: _____

E. REAL ESTATE OWNED (continued) (Indicate with an X if others have ownership interest.)

Title in Name Of	Description & Location	X	Date Acquired	Original Cost	Present Value of Real Estate	Amount of Insurance Carried	Mortgage or Contract Payable			
							Balance Due	Payment	Maturity	To Whom Payable
TOTAL										

F. MORTGAGES & CONTRACTS OWNED (Indicate by X if others have an ownership interest.)

Contract	Mortgage	X	Maker Name	Maker Address	Property Covered	Start Date	Payment	Maturity	Balance Due
TOTALS									

G. PERSONAL PROPERTY (Indicate by an X if others have an ownership interest.)

Description	X	Date When New	Cost When New	Value Today	Balance Due	To Whom Payable
TOTALS						

H. NOTES (Other than bank, mortgage, and insurance company loans.)

Payable To	Other Obligers (if any)	When Due	Notes Due to Relatives & Friends	Notes Due to "Others" (Not Banks)	Accounts & Bills Payable	Contracts Payable	Collateral (if any)
TOTALS							

For the purpose of procuring credit from time to time, I/we furnish the foregoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the lender to verify in any manner appropriate any and all items indicated on this statement. The undersigned also agree(s) to notify the lender immediately in writing of any significant adverse change in such financial condition.

Signature: _____ Signature: _____ Date: _____