

## Financial Information Worksheet (Income, Assets, Debts, and Ownership)

Applicant Name: \_\_\_\_\_

Date Completed: \_\_\_\_\_

Spouse/Partner Name (if applicable): \_\_\_\_\_

### 1. Monthly Income

Source of Income	Owner (Applicant / Spouse / Joint)	Monthly Amount	Notes

Total Monthly Income (Applicant ): \_\_\_\_\_ (Spouse/Partner): \_\_\_\_\_

### 2. Bank Accounts

Financial Institution	Account Type	Owner	Approximate Balance

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## 3. Investments

Investment Type	Institution	Owner	Approximate Value

## 4. Retirement Accounts

Account Type	Institution	Owner	Approximate Value

## 5. Real Estate

Property Address	Type (Home, Rental, Land)	Owner	Estimated Value	Mortgage Balance

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### 6. Vehicles and Personal Property

Asset	Owner	Estimated Value

### 7. Life Insurance

Company	Type (Term / Whole)	Owner	Cash Value	Death Benefit

### 8. Debts and Liabilities

Creditor	Type of Debt	Owner	Balance	Monthly Payment

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### 9. Ownership and Beneficiaries

Asset	Owner	Beneficiary (if any)

### 10. Recent Financial Changes

Has Applicant gifted or transferred money or property within the past five years?

Yes  No

If yes, please describe: \_\_\_\_\_

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### 11. Additional Notes

Anything else we should know about Applicant's financial situation: \_\_\_\_\_

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