

FINANCIAL WORKSHEET

MORTGAGOR: _____

LOAN #1 _____

LOAN#2 _____

1. HOW MANY INDIVIDUALS LIVE IN YOUR HOME: _____

2. TOTAL CURRENT MONTHLY INCOME: BORROWER: _____

CO-BORROWER: _____

NET SALARY/WAGES: \$ _____ \$ _____

Other Income: \$ _____ \$ _____

(Example(s): Commission/Disability/Social Security/Child Support/Alimony/Rental Properties

3. CURRENT MONTHLY EXPENSES:

- a. Existing Mortgage Payment \$ _____
- b. Other Mortgage Loans \$ _____
- c. Installment/car/boat/rv loans \$ _____
- d. Credit Cards – Visa, MC, Amex or store \$ _____
- e. Lines of Credit (credit line/home equity line) \$ _____
- f. Charge Off Accounts: \$ _____
- g. Other credit cards \$ _____
- h. Credit Accounts that are past due more than 5 months \$ _____
- i. Food \$ _____
- j. Utilities \$ _____
- k. Transportation \$ _____
- l. Child Care/Alimony \$ _____
- m. Personal/Family Loan &/or Tuition \$ _____
- n. Medical expenses not covered by insurance \$ _____
- o. Cell phone/cable/internet/satellite \$ _____
- p. Association Fees or Monthly Dues \$ _____
- q. Dry Cleaning/Laundry \$ _____
- r. Property Taxes (if not included in mortgage payment) \$ _____
(Qtr amount: _____ /Are any payments delinquent)
- s. Homeowners insurance (if not included in mortgage payment) \$ _____
(Are any payments delinquent)

4. ASSETS

- a. Current balance: Checking 1: _____ Checking 2: _____
Savings 1: _____ Savings 2: _____

BORROWER: _____

BORROWER: _____

SIGNATURE: _____

SIGNATURE: _____