

Financial Data

For What Period Did You Last File a Federal Income Tax Return	Where Filed	Amount of Gross Income Reported
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Fixed Monthly Expenses

Rent	Food	Utilities	Interest
Debt Repayment (including installments)	Other (Specify)	Total Fixed Monthly Charges	

Loans Payable

Owe To	Purpose & Date of Loan	Original Amount	Present Balance

Assets and Liabilities

Assets (Fair Market Value)	Liabilities
Cash \$ _____	Bills Owed (grocery, doctor, lawyer, etc) \$ _____
Checking Accounts (show locations) _____	Installment Debt (car, furniture, clothing, etc) _____
_____	Taxes Owed _____
Savings Accounts (show locations) _____	Income – Other (Itemize) _____
_____	_____
Motor Vehicles Year Make	Loans Payable (to banks, finance co., etc.) _____
_____	Judgments You Owe _____
_____	Real Estate Mortgages _____
Debts Owed to You (give name of debtor) _____	Other Debts (itemize) _____
_____	_____
Judgments Owed to You _____	_____
_____	_____
Stocks, Bonds, Securities _____	

Real Estate _____	

Total Assets \$ _____	Total Liabilities \$ _____

Real Estate Owned

Address	How Owned (jointly, individually, etc)	Date Acquired	Cost	Unpaid Amount of Mortgage
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Real Estate Being Purchased Under Contract

Address		Name of Seller		
Contact Price	Principal Amount Still Owing	Next Cash Payment Date Due	Amount of payment	

Life Insurance Policies

Company	Face Amount	Cash Surrender Value	Outstanding Loans

All Transfers of Property Including Cash (by loan, gift, sale, etc.) That you have made within the last 3 years (items of \$300 or over)

Date	Amount	Property Transferred	To Whom

Are you a party in any lawsuit now pending? Yes, give details below No

Are you a trustee, executor or administrator? Yes, give details below No

Is anyone holding any moneys on our behalf? Yes, give details below No

Is there any likelihood you will receive an inheritance? Yes, by whom? No

Do you receive, or under any circumstances, expect to receive benefits, from any established trust, from a claim for compensation or damages, or from a contingent or future interest in property of any kind?

Yes, explain below No

I certify that I believe that the above statement is true and that it is a complete statement of all my income and assets, real and personal, whether held in my name or by any other.

Date

Signature

Date

Witness