



Financial Worksheet

Borrower's Name(s): _____ **Loan Number:** _____

Names:	Social Security Number:
Names:	Social Security Number:
Home Telephone Number:	Work Telephone Number: () ()
If necessary, who should we call to set up an appointment to appraise the property:	**How many members are in the household? _____

Property Address

Street Address, City, State, Zip Code

Mailing Address (If different than property address) ☐ Rent ☐ Own How long? _____

Street Address, City, State, Zip Code

I. Monthly Income Data

Description	Income Borrower	Income Co-borrower	Total
Net Salary/Wages			
Commissions/Bonuses			
Other (Identify)			
Total Net Income			

II. Assets

III. Liabilities

Description	Estimated Value	Description	Monthly Payment	Balance Due
Home		Mortgage		
Other Real Estate (explain)		Other Mortgages/Rent		
Automobile		Alimony/Child Care		
Automobile		Automobile Expenses (oil, gas, etc.)		
Checking Accounts		Automobile Insurance		
Savings/Money Market		Food		
IRA/Keogh Accounts		Utilities (total)		
401K/ESOP Accounts		Insurance		
Stock/Bonds, CD's		Student Loan		
Other Investments (explain)		Credit Card		
		Other Expenses (identify)		
		Total		

I (we) certify that the financial information stated above is true, and is an accurate statement of my /our financial condition. I/WE understand and acknowledge that any action taken by the lender of my /our mortgage loan on my/our behalf will be made in strict reliance on the financial information provided. My/Our signature (s) below grants the holder of my/our mortgage the authority to obtain a credit report to verify the information in this financial to be accurate.

By: _____ Date: ____/____/____ By: _____ Date: ____/____/____

Final Instructions

- Make Sure you have signed and dated the form.