

Family Financial Statement

	Borrower	Coborrower
Name:	_____	_____
Address:	_____	_____
	_____	_____
Home phone number:	_____	_____
Employer:	_____	_____
Employer's address:	_____	_____
Work phone number:	_____	_____

Worksheet 1: Income and Expenses

	Borrower (\$)	Coborrower (\$)	Total (\$)
I. INCOME			
A. Monthly gross income			
1. Employment	_____	_____	_____
2. Public benefits	_____	_____	_____
3. Dividends	_____	_____	_____
4. Royalties	_____	_____	_____
5. Interest & other investment income	_____	_____	_____
6. Other (specify):	_____	_____	_____
_____	_____	_____	_____
B. Total Monthly Gross Income	_____	_____	_____
II. MONTHLY EXPENSES			
A. Nonhousing			
1. Child care	_____	_____	_____
2. Clothing	_____	_____	_____
3. Food	_____	_____	_____
4. Insurance	_____	_____	_____
a. Auto	_____	_____	_____
b. Life	_____	_____	_____
c. Medical & dental	_____	_____	_____
5. Other medical	_____	_____	_____
6. Personal	_____	_____	_____

- 7. Education _____
- 8. Taxes (nonhousing) _____
- 9. Transportation _____
- 10. Other (specify): _____

B. Current Housing

- 1. Mortgage _____
- 2. Taxes _____
- 3. Insurance _____
- 4. Utilities _____
- 5. Rent _____
- 6. Other (specify): _____

C. Total Monthly Expenses

Worksheet 2: Assets and Liabilities

I. ASSETS (Cash or Market Value) Borrower (\$) Coborrower (\$) Total (\$)

A. Cash & cash equivalents

- 1. Cash _____
- 2. Deposits (list): _____

B. Marketable securities

- 1. Stocks/bonds (bid price) _____
- 2. Other securities _____
- 3. Mutual funds _____
- 4. Life insurance _____
- 5. Other (specify): _____

C. Total cash & marketable securities

D. Nonliquid assets

- 1. Real estate _____
- 2. Retirement funds _____
- 3. Business _____

4. Motor vehicles _____
5. Other (specify): _____

E. Total nonliquid assets _____

F. Total all assets _____

II. LIABILITIES **Borrower (\$)** **Coborrower (\$)** **Total (\$)**

A. Debts

1. Real estate loans _____

2. Student loans _____

3. Motor vehicle loans _____

4. Child or spousal support _____

5. Personal loans _____

6. Credit cards (specify): _____

7. Other (specify): _____

B. Total liabilities _____

III. NET WORTH **Borrower (\$)** **Coborrower (\$)** **Total (\$)**

(Total assets minus total liabilities)
