

Financial Worksheet

Income

Name	Monthly Income

Monthly Expenses

Item	Amount
Existing Mortgage Payment	
Other Mortgage Loans	
Car/Boat/PV Loans	
Credit Cards	
Lines of Credit	
Credit Accounts past due more than five months	
Food	
Utilities	
Transportation	
Child Care/Alimony	
Loan and/or Tuition	
Medical Expenses	
Phone/Cable/Internet	
Association Fees	
Dry Cleaning/Laundry	

Assets

Item	Value (Estimated)
Home	
Other Property	
Automobile	
Retirement Account(s)	
Stocks	
Other Investments	