

Charge Account/Loan Payments
Investment/Retirement Contributions
Religious Contributions
Average monthly donations to other organizations
Other:
Other:
Other:
TOTAL MONTHLY EXPENSES

\$0.00

Average monthly checking account balance
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FINANCIAL ASSETS

Value of Residence
Amount in Savings
Amount in Investments (Retirement & Other)
Value of Cars
Other Assets
TOTAL ASSETS

\$0.00

FINANCIAL INDEBTEDNESS

Mortgage Balance on property owned
Mortgage Balance on property owned
Mortgage Balance on property owned
Loan Balance for Cars
Credit Card(s) Balance
All other outstanding loans
TOTAL LIABILITY

\$0.00

LIFE INSURANCE COVERAGE

Applicant A:
Applicant B:

Applicant A Signature

Applicant B Signature

Date

Date