

FINANCIAL WORKSHEET

Borrower Name: _____

Loan Number: _____

Co Borrower Name: _____

Income

Monthly Gross

Monthly Net

Source

Borrower Income

CoBorrower Income

Other Income 1

Other Income 2

Other Income 3

Total Gross Income

Total Net Income

Total Annual Income

Expenses

Monthly Payment

Unpaid Balance

Mortgage

2nd Mortgage

Monthly Property Taxes

(If not included in payment)

Homeowner Insurance

(If not included in payment)

Homeowner Association Fee

Cell Phone

Home Phone

Cable/Internet

Electric

Trash

Gas

Water

Monthly Food Costs

Car Insurance

Car

Vehicle Gas

Daycare/Childcare

Child Support

Health Insurance

Medical/Dental Costs

Monthly Prescription Costs

Life Insurance Costs

Credit Cards

Monthly Payments

Unpaid Balance

Current Employment Information

Borrower

Co Borrower

Name of Employer

Position/Title

Hire Date

Business Phone

Pay Frequency

Summary

Total Dependents:

Total in Household:

Assets

Estimated Value

Checking Accounts

Savings Accounts

IRA/401K/Keogh Accounts

Other

Total Assets

Total Expenses

Total Balance

Additional Expenses

Gross Monthly Surplus

Net Monthly Surplus

Applicant Signature

Date

Co-Applicant Signature

Date

Benjamin Rose: Housing and Financial Wellness - Helping people in all stages of life achieve and maintain financial wellness and housing stability through HUD-approved housing and financial counseling and education, as well as benefits enrollment assistance.