

# FINANCIAL STATEMENT

## BORROWER INFORMATION

BORROWER NAME: \_\_\_\_\_ SOCIAL SECURITY# \_\_\_\_\_

CELL PHONE#: \_\_\_\_\_ HOME TELEPHONE: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

CO-BORROWER NAME: \_\_\_\_\_ SOCIAL SECURITY# \_\_\_\_\_

CELL PHONE#: \_\_\_\_\_ HOME TELEPHONE: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

MAILING ADDRESS:

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

NUMBER OF DEPENDENTS (INCLUDING YOURSELF) \_\_\_\_\_

## EMPLOYMENT INFORMATION

### BORROWER

### CO-BORROWER

EMPLOYER: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: ( ) \_\_\_\_\_

TELEPHONE: ( ) \_\_\_\_\_

POSITION: \_\_\_\_\_

POSITION: \_\_\_\_\_

NUMBER OF YEARS ON JOB \_\_\_\_\_

NUMBER OF YEARS ON JOB \_\_\_\_\_

### ASSETS/LIABILITIES

<b>DESCRIPTION</b>	<b>ESTIMATED VALUE</b>	<b>AMOUNT OWED</b>	<b>NET VALUE (DIFFERENCE)</b>
<b>PRIMARY RESIDENCE ADDRESS:</b>			
<b>OTHER REAL PROPERTY ADDRESS:</b>			
<b>AUTOMOBILE MAKE/MODEL:</b>			
<b>AUTOMOBILE MAKE/MODEL:</b>			
<b>BANK ACCOUNTS – CHECKING</b>			
<b>BANK ACCOUNTS – SAVINGS</b>			
<b>IRA/KEOUGH ACCOUNTS</b>			
<b>401K SAVINGS PLAN</b>			
<b>STOCKS/BONDS/CDs</b>			
<b>BOAT(S)</b>			
<b>CASH VALUE OF LIFE INSURANCE</b>			
<b>COLLECTIONS/ART/COINS/ETC</b>			
<b>COMPUTERS/ELECTRONICS</b>			
<b>OTHER: (specify)</b>			
<b>OTHER: (specify)</b>			

**COMMENTS:**

**MONTHLY INCOME DATA**

<b>DESCRIPTION</b>	<b>BORROWER INCOME</b>	<b>CO-BORROWER INCOME</b>	<b>TOTAL</b>
<b>GROSS SALARY/WAGES</b>			
<b>OVERTIME PAY</b>			
<b>COMMISSIONS/TIPS</b>			
<b>BONUSES</b>			
<b>INTEREST/DIVIDENDS (Savings, Life Insurance, Stocks/Bonds)</b>			
<b>ALIMONY</b>			
<b>CHILD SUPPORT</b>			
<b>RENTAL PROPERTY INCOME</b>			
<b>OTHER: (specify)</b>			
<b>OTHER: (specify)</b>			
<b>TAXES: FEDERAL INCOME TAX</b>			
<b>FICA</b>			
<b>STATE INCOME TAX</b>			
<b>OTHER: (specify)</b>			
<b>OTHER DEDUCTIONS: (specify)</b>			
<b>NET INCOME</b>			

## MONTHLY EXPENSES

DESCRIPTION	MONTHLY PAYMENT	BALANCE DUE	MONTHS DELINQUENT
MORTGAGE PAYMENT (Primary Residence)			
MORTGAGE PAYMENT (Other)			
ALIMONY/CHILD SUPPORT			
CHILD CARE			
AUTO LOAN – 1 type of auto			
AUTO LOAN – 2			
OTHER LOAN PAYMENT			
CREDIT CARD PAYMENTS (Visa, MC, Other)			
UTILITIES (Gas, Electric, Water/Sewage)			
TELEPHONE, CABLE AND INTERNET SERVICE			
CELL PHONES			
AUTO INSURANCE			
HEALTH/LIFE INSURANCE			
CHARITABLE DONATIONS			
MEDICAL (Doctor/Dentist, Drugs, Hospital, etc)			
GASOLINE/PARKING/AUTO MAINTENANCE			
FOOD			
CLOTHES			
ENTERTAINMENT (Movies, TV, Sports, Dinner)			
OTHER: (specify) child support?			
OTHER: (SPECIFY)			
<b>TOTAL</b>			



**ADDITIONAL INFORMATION REQUIRED:**

- 1. Tax Returns for last two years, including all schedules and W-2s**
- 2. Verification of all income including: two most recent paystubs, award letters and/or leases**
- 3. Bank Statements for last two months for ALL checking and savings accounts**
- 4. If self-employed, tax returns for last two years, including all schedules, last six months of bank statements for ALL checking and savings accounts and a year-to-date Profit & Loss statement**

I obtained a Mortgage Loan secured by the above referenced mortgaged property. I have described my current financial condition with this Financial Statement form and I certify that all information presented herein as well as all attachments are true, accurate and correct to the best of my knowledge. I understand that submission of this information in no way obligates my Mortgage Servicer, Investor or Insurer to provide assistance to me.

By signing this Financial Statement, I hereby authorize my Mortgage Servicer and/or Mortgage Insurer to:

1. Order a credit report from any reporting agency
2. Verify, when deemed necessary, any current or previous employment, bank accounts, tax returns, or assets
3. Release any and all information concerning the above.

I therefore agree that if it is determined that the financial information provided herein has been misrepresented by me and such misrepresentations have induced action by the Mortgage Servicer, Investor and/or Insurer that would not have been taken, had the true facts been known; I shall be liable for any or all losses or damages suffered by the Mortgage Servicer, Investor and/or Insurer.

Submitted this, \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_\_

\_\_\_\_\_  
Borrower Name (Print)

\_\_\_\_\_  
Borrower Signature

\_\_\_\_\_  
Co-Borrower Name (Print)

\_\_\_\_\_  
Co-Borrower Signature