

FINANCIAL WORKSHEET

Current Income

Marital Status

- Married
- Single
- Divorced
- Separated
- Widowed

List all dependents of you and your spouse, their ages, and relationship to you.

<u>Name</u>	<u>Age</u>	<u>Relationship</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Part A. Debtor's Income:

1. What is your occupation? _____.
2. Name and address of employer?

3. How long have you been employed there? _____.
4. What is the gross amount of your paycheck, before taxes, and other deductions taken out?
_____.
5. How often do you get paid?
 once a week every two weeks twice a month
 once a month other _____.
6. Do you receive overtime pay outside your salary? If so, how much per month?
_____.
7. How much is taken out of each paycheck for taxes and social security?
_____.
8. How much is taken out for insurance? _____.
9. How much for union dues? _____.
10. Are there other deductions? If so, what are they and how much?
_____.

Do you receive . . .

- a) income from business operations outside of your regular paycheck listed above? If so, what is the business and how much do you receive?
_____.
- b) income from real estate property? If so, how much per month?
 No Yes \$ _____.
- c) interest or dividends? If so, how much per month?
 No Yes \$ _____.
- d) alimony or family support payments for your use or for the care of your dependents? If so, how much per month? No Yes \$ _____.
- e) social security or other forms of monetary government assistance?

No Yes \$ _____.
f) retirement or pension money? No Yes \$ _____.

Do you have any other sources of income not listed?

_____.

Part B. Joint Debtor's Income:

11. What is your occupation? _____.

12. Name and address of employer?

_____.

13. How long have you been employed there? _____.

14. What is the gross amount of your paycheck, before taxes, other deductions taken out?

_____.

15. How often do you get paid?

once a week every two weeks twice a month

once a month other _____.

16. Do you receive overtime pay outside your salary? If so, how much per month?

_____.

17. How much is taken out of each paycheck for taxes and social security?

_____.

18. How much is taken out for insurance? _____.

19. How much for union dues? _____.

20. Are there other deductions? If so, what are they and how much?

_____.

Do you receive . . .

g) income from business operations outside of your regular paycheck listed above? If so, what is the business and how much do you receive?

_____.

h) income from real estate property? If so, how much per month?

No Yes \$ _____.

i) interest or dividends? If so, how much per month?

No Yes \$ _____.

j) alimony or family support payments for your use or for the care of your dependents? If so, how much per month? No Yes \$ _____.

k) social security or other forms of monetary government assistance?

No Yes \$ _____.

l) retirement or pension money? No Yes \$ _____.

Does your spouse have any other sources of income not listed?

Are you or your spouse expecting any increase or decrease in salary of more than 10% in the next year? If so, explain.

Current Expenses

Do you and your spouse maintain separate households? No Yes. The following questions are for your expenses each month.

1. Your rent or home mortgage \$ _____
Does that amount include real estate taxes? No Yes
Does it include property insurance? No Yes
2. Electricity and heating \$ _____
3. Water and sewage \$ _____
4. Telephone service / long distance \$ _____
5. Do you have any other utility bills? If so, what and how much?

6. Home maintenance, including repairs and general upkeep \$ _____
7. Food \$ _____
8. Clothing \$ _____
9. Laundry and dry cleaning \$ _____
10. Medical and dental expenses \$ _____
11. Transportation (not including car payments) \$ _____
12. Entertainment, recreation, newspaper, magazines \$ _____
13. Charitable contributions \$ _____
14. Insurance not deducted from paycheck
a) homeowner's or renter's insurance \$ _____
b) life insurance \$ _____
c) health insurance \$ _____
d) auto insurance \$ _____
e) other insurance _____ \$ _____
15. Taxes not deducted from paycheck \$ _____
16. Installment payments for car, furniture, etc. (Specify)
_____ \$ _____
_____ \$ _____
17. Alimony, maintenance, support paid to others \$ _____
18. Payments for support of dependents not living at home \$ _____
19. Expenses from operation of business \$ _____
20. Other expenses not listed above _____ \$ _____