

# 300 Summer St Personal Financial Statement

## PART 1. Personal Profile

Full Name	<input type="text"/>		
Street	<input type="text"/>		
City	<input type="text"/>		
State	<input type="text"/>	ZIP	<input type="text"/>
Daytime Telephone	<input type="text"/>	Evening Telephone	<input type="text"/>
Occupation	<input type="text"/>		
Employer's Name	<input type="text"/>		
Employer's Address	<input type="text"/>		
Length of Employment	<input type="text"/>		
Previous Employer	<input type="text"/>		
City or Town	<input type="text"/>		
Contact	<input type="text"/>		
Telephone	<input type="text"/>		

## Joint Applicant Information

Full Name	<input type="text"/>
Occupation	<input type="text"/>
Employer	<input type="text"/>

## PART 2. Personal Financial Profile

### Assets

Checking Account Balance   
Savings Account Balance   
Other Account Balance   
Brokerage Account  Value   
Real Estate  Value

### Liabilities

Mortgage   
Automobile Loan   
Personal Loan   
Other Loan   
Credit Card Name  Amount   
Credit Card Name  Amount   
Credit Card Name  Amount

## PART 3. Personal Income and Expenses

### Annual Income

Annual Salary, Bonuses and Commissions   
Dividends and Interest   
Rental Income   
Other Income\*   
**Total Income**

\*You need not list alimony, child support or separate maintenance income if you do not wish to have it considered.

### Annual Expenses

Mortgage/Rental Payments   
Real Estate Taxes   
Federal, State and Local Taxes   
Insurance Premiums   
Credit Cards, Car Payments, etc.   
Other Expenses   
**Total Annual Expenses**