

AFS Financial Statement

s form to determine your Financial Situation. Please call us toll free 1-866-544-0990 if you have any que

Assets and Income Information

| <u>LIQUID ASSETS:</u> | <u>ESTIMATED VALUE:</u> |
|---|-------------------------|
| Cash: | \$ - |
| Checking and Savings: | |
| Certificates of Deposit (COD's): | \$ - |
| Stocks, Bonds, and Mutual Funds: | |
| All Retirement Assets (401(k), IRA's, etc): | |
| Other: | \$ - |
| TOTAL LIQUID ASSETS: | \$ - |

| <u>NON-LIQUID ASSETS:</u> | <u>ESTIMATED VALUE:</u> | <u>AMOUNT OWED:</u> | <u>NET VALUE:</u> |
|---------------------------------|-------------------------|---------------------|-------------------|
| Primary Home: | \$ - | \$ - | \$ - |
| Other Home: | \$ - | \$ - | \$ - |
| Automobile 1: | \$ - | \$ - | \$ - |
| Automobile 2: | \$ - | \$ - | \$ - |
| Automobile 3: | \$ - | \$ - | \$ - |
| Cash Value of Life Insurance: | \$ - | \$ - | \$ - |
| Boat: | \$ - | \$ - | \$ - |
| Trailer: | \$ - | \$ - | \$ - |
| Other: | \$ - | \$ - | \$ - |
| TOTAL NON-LIQUID ASSETS: | \$ - | \$ - | \$ - |

Income Information

| <u>DESCRIPTION (MONTHLY):</u> | <u>BORROWER 1:</u> | <u>BORROWER 2:</u> | <u>MONTHLY TOTAL:</u> |
|------------------------------------|--------------------|--------------------|-----------------------|
| Gross Salary/Wages: | \$ - | \$ - | \$ - |
| Overtime Pay: | \$ - | \$ - | \$ - |
| Commissions: | \$ - | \$ - | \$ - |
| Bonuses: | | \$ - | |
| Interest Dividends: | \$ - | \$ - | \$ - |
| Child Support / Alimony: | \$ - | | \$ - |
| Rental Property: | \$ - | \$ - | \$ - |
| Disability/Social Security/Retire: | \$ - | | \$ - |
| Other: | \$ - | \$ - | \$ - |
| Other: | \$ - | \$ - | \$ - |
| TOTAL MONTHLY INCOME: | \$ - | \$ - | \$ - |

Deductions

| <u>DEDUCTIONS:</u> | <u>BORROWER 1:</u> | <u>BORROWER 2:</u> | <u>MONTHLY TOTAL:</u> |
|------------------------------|--------------------|--------------------|-----------------------|
| Federal, FICA, and State: | \$ - | \$ - | \$ - |
| Other Deductions (401k, etc) | \$ - | \$ - | \$ - |
| Child Support / Alimony: | \$ - | \$ - | \$ - |
| Medical or Dental: | \$ - | | \$ - |
| Other: Life Insurance | | \$ - | \$ - |
| TOTAL DEDUCTIONS: | \$ - | \$ - | \$ - |
| NET MONTHLY INCOME: | \$ - | \$ - | \$ - |

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Toll Free 866-544-0990 Fax 918-272-0991

| Expense Information | | | |
|--|------------------------------|-------------------------|---------------------|
| CATEGORY: | DESCRIPTION: | MONTHLY PAYMENT: | BALANCE DUE: |
| Monthly Loan Payments | Monthly Mortgage 1: | \$ - | \$ - |
| | Monthly Mortgage 2: | | \$ - |
| | Automobile 1: | \$ - | \$ - |
| | Automobile 2: | \$ - | \$ - |
| | Automobile 3: | \$ - | \$ - |
| | Alimony/Child Support: | \$ - | \$ - |
| | Student Loans: | \$ - | \$ - |
| | Loans/Medical Bill/Other: | \$ - | \$ - |
| Credit Card Payments | Visa: | | \$ - |
| | Mastercard: | \$ - | \$ - |
| | Other: | | \$ - |
| Monthly Utility Payments | Electricity: | \$ - | \$ - |
| | Gas: | \$ - | \$ - |
| | Water: | \$ - | \$ - |
| | Phone: | \$ - | \$ - |
| | Cellular: | \$ - | \$ - |
| | Cable: | \$ - | \$ - |
| | Internet: | | \$ - |
| | Homeowners Association Fees: | | \$ - |
| | Property Insurance: | \$ - | \$ - |
| | Property Taxes: | \$ - | \$ - |
| | Other: | | \$ - |
| Insurance | Automobile: | \$ - | \$ - |
| | Health: | \$ - | \$ - |
| | Life: | \$ - | \$ - |
| Car | Gasoline: | \$ - | \$ - |
| | Parking/Transit: | \$ - | \$ - |
| | Maintenance: | | \$ - |
| Household | Groceries: | \$ - | \$ - |
| | Work/School Lunches: | \$ - | \$ - |
| | Household Supplies: | \$ - | \$ - |
| | Child Care/Day Care: | \$ - | \$ - |
| | Education/Tuition: | | \$ - |
| | Charitable Donations: | | \$ - |
| | Animal Care: | | \$ - |
| | Other: Prescriptions | | \$ - |
| Other | Spending/Entertainment: | | \$ - |
| | Medical | | \$ - |
| | Other: | \$ - | \$ - |
| TOTAL MONTHLY EXPENSES: | | \$ - | |
| Monthly Surplus - | | | |
| <p>To determine your Monthly Surplus, take you net income and subtract your expenses. If it is a negative number you need to do something to improve your monthly income or cut some expenses.</p> | | | |

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