



Financial Information and Worksheet

Name Date of birth (DD/MM/YY)
 Address
 We Rent Own our home and pay \$ per month as rent/mortgage.
 Relationship status
 Number of dependents Ages (list)
 Title, Employer In position since

This financial worksheet is for myself combined with spouse/partner
 Use the balance sheet below to determine your assets, liabilities, and net worth.

Assets		Liabilities and Net Worth	
Asset	Value	Source	Liability
Real estate		Real estate loans	
Investments		Vehicle loans	
Cash and savings accounts		Student loans	
Vehicles		Credit card debt	
Furniture/household items		Other liabilities	
Other assests		Total liabilities	
Total		Total assets	
		Assets - liabilities = Net worth	

Use the tool below to determine your total annual household income and your expenses for the calendar year.

Income		Expenses	
Source	Value	Source	Expense
Employment		Tithe	
Spouse/partner employment		Charitable contributions	
Scholarships and grants		Seminary tuition	
Pending financial aid applications		CPE tuition	
Pensions and Social Security		Books and supplies	
Parish support		Other fees	
Parents/relatives support		Housing	
Investments and savings		Food	
Other sources		Clothing	
Total		Other living expenses	
		Life insurance	
		Medical/dental insurance	
		Automobile insurance	
		Auto loan	
		Credit card debt	
		Student loans	
		Other loans	
		Taxes	
		Child support	
		Total expenses	