

# THE MIRIAM PROJECT

## FINANCIAL PROFILE

Name \_\_\_\_\_

Date \_\_\_\_\_

### INCOME

- Salary and/or wages (current yearly gross income, including bonuses, if applicable)  
Husband \$ \_\_\_\_\_  
Wife \$ \_\_\_\_\_
- Income from interest \$ \_\_\_\_\_
- Income from dividends \$ \_\_\_\_\_
- Rental income \$ \_\_\_\_\_
- Other \$ \_\_\_\_\_
- Other \$ \_\_\_\_\_
- Total \$ \_\_\_\_\_

### HOUSE (if owned or buying)

- Estimated value: \$ \_\_\_\_\_
- Original price: \$ \_\_\_\_\_
- Balance on mortgage: \$ \_\_\_\_\_
- Mortgagee: \_\_\_\_\_
- Monthly payment: \$ \_\_\_\_\_

### RENTAL HOUSING

- Monthly payment: \$ \_\_\_\_\_
- Landlord: \_\_\_\_\_

### OTHER FIXED MONTHLY EXPENSES

- Utility costs \$ \_\_\_\_\_
- other: \$ \_\_\_\_\_

### INSURANCE WHOLE LIFE & TERM

Insured: \$ \_\_\_\_\_  
Amount: \$ \_\_\_\_\_  
Company \_\_\_\_\_  
Monthly Cost: \$ \_\_\_\_\_  
Company \_\_\_\_\_  
Cost, if applicable \_\_\_\_\_  
\_\_\_\_\_

### BANK ACCOUNTS

- Savings  
Insured: Yes \_\_\_\_\_ No \_\_\_\_\_  
Amount: \$ \_\_\_\_\_  
Institution: \_\_\_\_\_
- Checking Accounts  
Insured: Yes \_\_\_\_\_ No \_\_\_\_\_  
Amount: \$ \_\_\_\_\_  
Institution \_\_\_\_\_

**\*FOR ADDITIONAL INFORMATION, PLEASE USE A SECOND PAGE.**

### INVESTMENTS (Stocks, bonds, savings certificates, certificates of deposit, tax deferred annuities)

Name	Value
_____	_____
_____	_____
_____	_____
_____	_____

### AUTOMOBILES

Make \_\_\_\_\_ Year \_\_\_\_\_

Monthly Payment \_\_\_\_\_

Balance on Loan \_\_\_\_\_

Blue Book Value \_\_\_\_\_

Make \_\_\_\_\_ Year \_\_\_\_\_

Monthly Payment \_\_\_\_\_

Balance on Loan \_\_\_\_\_

Blue Book Value \_\_\_\_\_

Make \_\_\_\_\_ Year \_\_\_\_\_

Monthly Payment \_\_\_\_\_

Balance on Loan \_\_\_\_\_

Blue Book Value \_\_\_\_\_

### OTHER REAL PROPERTY

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### OUTSTANDING MONTHLY OBLIGATIONS

(Visa, Master Card, charge accts., etc.)

Name	Amount	Mthly Payment
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**\* Please provide supporting documents including: 2 consecutive pay stubs per adult, 2 consecutive bank statements (checking & savings), 1 recent 401K report, & any other supporting documents such as stocks, bonds, etc.**