

► **FINANCIAL INFORMATION STATEMENT**

Mother _____ Father _____ Children _____ Date of Marriage _____
(if applicable)

A. Monthly Expenses

HOUSEHOLD	PRESENT
1. Rent/Mortgage	
2. Real Property Taxes/Insurance	
3. Cellular Phone	
4. TV/Internet	
5. Utilities (Gas, Water, Electric)	
6. Homeowner or Renter's Insurance	
7. Homeowner Association Fees	
8. Security System	
9. Pool Service	
10. Housekeeping/Cleaning Service	
11. Repairs and Maintenance	
12. Yard Maintenance	
13. Groceries and Household Supplies	
TOTAL HOUSEHOLD	\$
AUTO AND TRANSPORTATION FOR SELF	
14. Car Payment	
15. Car Insurance	
16. Gasoline and Oil	
17. Car Maintenance and Repair	
18. Other Transportation (Uber, Rentals, etc.)	
19. Tolls and Parking Fees	
20. Yearly Car License Tags	
TOTAL AUTO TRANSPORTATION FOR SELF	\$

A. Monthly Expenses (continued)

MEDICAL/DENTAL FOR CHILDREN (not covered by ins.)	
21. Cost of Health Insurance Premium for Children <small>(not paid by employer)</small>	
22. Medical Doctor	
23. Dentist	
24. Orthodontist	
25. Dermatologists	
26. Counseling	
27. Prescriptions	
28. Vitamins	
TOTAL MEDICAL/DENTAL FOR CHILDREN	\$
MEDICAL/DENTAL FOR SELF (not covered by ins.)	
29. Medical Doctor	
30. Dentist	
31. Dermatologists	
32. Counseling	
33. Prescriptions	
34. Vitamins	
TOTAL MEDICAL/DENTAL FOR SELF	\$
INSURANCE	
35. Life Insurance	
36. Health Insurance Premium (not paid by employer)	
TOTAL INSURANCE	\$

A. Monthly Expenses (continued)

PERSONAL-CHILDREN	
37. Clothing	
38. Laundry and Dry-cleaning	
39. Barber/Hairdresser	
40. School Tuition	
41. Books and Supplies	
42. Uniforms	
43. Activity Fees	
44. Summer School	
45. Tutors	
46. School Dances	
47. Club Dues and Membership Fees	
48. Extracurricular Activities	
49. Field Trips (and Spending Money)	
50. School Memorabilia (Yearbooks, t-shirts, etc.)	
51. Movies and Subscriptions	
52. Concerts and Plays	
53. Entertainment Parks	
54. Tickets to Sporting Events	
55. Books and Leisure Reading	
56. iTunes and Video Games	
57. Gifts for Others	
58. Participation in Sports	
59. Summer Camp	
60. Athletic Clothing and Shoes	
61. Vacation and Travel Expenses	
62. Personal Items (Shampoo, Make-Up, etc.)	
TOTAL PERSONAL-CHILDREN	\$

A. Monthly Expenses (continued)

PERSONAL-SELF	
63. Clothing	
64. Laundry and Dry-cleaning	
65. Contributions and Donations (Charity/Religious)	
66. Barber/Hairdresser	
67. Entertainment	
68. Gifts	
69. Personal Toiletries	
70. Vacations	
71. Clubs and Membership Dues	
72. Veterinarian and Pet Food	
73. Financial Planning and Other Professional Services	
TOTAL PERSONAL-SELF	\$
MISCELLANEOUS	
74. Subscriptions (iTunes, Spotify, Netflix, Newspapers, etc.)	
75. Retirement Contributions (Not deducted from paycheck)	
76. Monthly Credit Card Payments	
77. Other: Specify _____	
TOTAL MISCELLANEOUS	\$
SUMMARY TOTAL OF ALL EXPENSES	\$

B. Income Statement

SELECT PAY FREQUENCY:	
<input type="checkbox"/> Once per month	
<input type="checkbox"/> Twice per month	
<input type="checkbox"/> Every two weeks	
<input type="checkbox"/> Every week	
Gross Monthly Income (Attach Last 3 Pay Stubs)	
TOTAL MONTHLY INCOME	\$
MONTHLY NET INCOME	\$