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**FINANCIAL DISCLOSURE FORM**

**INCOME INFORMATION**

Date: \_\_\_\_\_

Occupation (Job Title): \_\_\_\_\_

Employer: \_\_\_\_\_

Address: \_\_\_\_\_

Length of employment: \_\_\_\_\_

Frequency of pay-checks: (circle one) weekly / bi-weekly / bi-monthly / monthly

Gross Salary: \$\_\_\_\_\_ per (circle one) weekly / bi-weekly / bi-monthly / monthly

Bonus: \$\_\_\_\_\_ per year quarter month (circle one)

Net salary (take home): \$\_\_\_\_\_ per \_\_\_\_\_

Income from all other sources

(specify): \_\_\_\_\_

If you are unemployed, please explain how you meet your monthly living expenses: \_\_\_\_\_

**ASSETS**

**Real Estate**

Address:

\_\_\_\_\_  
(Street) (City)

\_\_\_\_\_  
(County) (State)

Owner(s) (exactly as listed on deed)

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

Approximate Present Value \$ \_\_\_\_\_

Approximate Equity: \$ \_\_\_\_\_

Address:

\_\_\_\_\_ (Street) \_\_\_\_\_ (City)

\_\_\_\_\_ (County) \_\_\_\_\_ (State)

Owner(s) (exactly as listed on deed)

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

Approximate Present Value \$ \_\_\_\_\_

Approximate Equity in Homestead: \$ \_\_\_\_\_

Savings Accounts

1. Institution: \_\_\_\_\_

Approximate Balance: \$ \_\_\_\_\_

Account in Name of: \_\_\_\_\_

2. Institution: \_\_\_\_\_

Approximate Balance: \$ \_\_\_\_\_

Account in Name of: \_\_\_\_\_

Checking Accounts

1. Institution: \_\_\_\_\_

Approximate Balance: \$ \_\_\_\_\_

Account in Name of: \_\_\_\_\_

2. Institution: \_\_\_\_\_

Approximate Balance: \$ \_\_\_\_\_

Account in Name of: \_\_\_\_\_

Brokerage Accounts

1. Company Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \$ \_\_\_\_\_

Name on Account: \_\_\_\_\_

2. Company Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \$ \_\_\_\_\_

Name on Account: \_\_\_\_\_

**Mutual Funds**

1. Fund Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \$ \_\_\_\_\_

Name on Account: \_\_\_\_\_

2. Fund Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \$ \_\_\_\_\_

Name on Account: \_\_\_\_\_

**Individual Stocks**

1. Company Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \$ \_\_\_\_\_

Holder of Record: \_\_\_\_\_

2. Company Name: \_\_\_\_\_

Number of Shares: \_\_\_\_\_

Approximate Value: \$ \_\_\_\_\_

Holder of Record: \_\_\_\_\_

**MONTHLY LIVING EXPENSES**

Mortgage/Rent Payment	\$ _____
Homeowner's Insurance	\$ _____
Homeowner's Association Dues	\$ _____
Real Estate Taxes	\$ _____
Gas	\$ _____
Heat	\$ _____
Electricity	\$ _____
Water	\$ _____
Cable TV	\$ _____
Telephone/Cell phone	\$ _____
Refuse Disposal	\$ _____
Food	\$ _____
Clothing	\$ _____
Grooming	\$ _____
Laundry and Dry Cleaning	\$ _____

Medical and Dental	\$ _____
Transportation (includes car payment,gas)	\$ _____
Auto Insurance	\$ _____
Life Insurance	\$ _____
Recreation, Entertainment, Travel	\$ _____
Newspapers and Magazines	\$ _____
Social and religious obligations	\$ _____
Personal Allowance and Incidentals	\$ _____
Babysitting and Child Care	\$ _____
Home Maintenance	\$ _____
Children School Needs and Allowances	\$ _____
Monthly Debt Payments	\$ _____
<b>TOTAL:</b>	\$ _____

**Please attach copies of the following:**

- One month's worth of pay-stubs for you
- Three months of checking/savings account statements
- Documentation of your housing costs (i.e. Lease)
- 2011 Tax Return