

FINANCIAL ANALYSIS

Annual Net Income

Annual Income:

- After-tax Household Salary _____
- Pension Income _____
- Government Benefits _____
- Investment Income _____
- Social Assistance _____
- Spousal/Child Support _____
- Other Income _____

TOTAL ANNUAL INCOME \$ _____

Annual Expenses:

- Mortgage/Rent _____
- Property Taxes/Condo Fees _____
- Home Insurance _____
- Utilities, i.e. hydro _____
- Telephone, Cable, Internet, Cellphone _____
- Furnishings/Appliances _____
- Home Maintenance _____
- Vehicle/Transportation Costs _____
- Life/Health Insurance _____
- Medical Costs _____
- Food _____
- Childcare _____
- Spousal/Child Support _____
- Pet Care _____
- Interest Payments _____
- Banking/Investment Fees _____
- Professional Fees _____
- Entertainment & Recreation _____
- Clothing _____
- Personal Maintenance _____
- Gifts _____
- Vacation _____
- Charitable Donations _____
- Other Expenses _____

TOTAL ANNUAL EXPENSES \$ _____

Annual Net Income = Annual Income – Annual Expenses \$ _____

FINANCIAL ANALYSIS

Net Worth

Assets @ Fair Market Value, FMV

- Cash/Savings _____
- Investments/Retirement Accounts _____
- Cash Surrender Value of Life Insurance _____
- Pension Plan _____
- Personal Residential Property _____
- Other Real Estate/Properties _____
- Vehicles _____
- Recreational Vehicle/Boat _____
- Appliances/Furniture _____
- Electronics _____
- Antiques/Collections _____
- Jewelry/Furs _____
- Collectibles _____
- Other Assets _____

TOTAL ASSETS \$ _____

Liabilities

- Credit Card Debt/Consumer Loans _____
- Vehicle Loan _____
- Loan on Life Insurance _____
- Mortgages _____
- Student Loans _____
- Unpaid Taxes _____
- Other Loans _____

TOTAL LIABILITIES \$ _____

Net Worth = Assets – Liabilities \$ _____