



Bank

America's Most Convenient Bank®

Consumer Collections
P.O. Box 9547
Portland, Maine 04112-9547

Financial Analysis Worksheet

Date

Borrower Information	
Borrower Name	
Co-Borrower Name	
Home Telephone Number	
Business Name, Address, Telephone Number	
Cell Phone or Alternative Number	
Property Address	
Mailing Address	

Income Data	
Gross Income	\$
Other Household Income	\$
Social Security	\$
Pension/Retirement	\$
Investment Property Income	\$

Assets/Liabilities	
Description	Estimated Value
Home	\$
Other Property	\$
Automobile	\$
Automobile/Other	\$

Interest/Dividends	\$
Total Net Income	\$

Bank Accounts	\$
IRA/401K	\$
Stocks/Bonds/CDs	\$

Secured Debts (Monthly Payments)	
1st Mortgage	\$
2nd Mortgage	\$
Condo Fees/Land Lease	\$
Student Loans	\$
Auto Loans/Leases	\$
Recreation (Boat, ATV, etc.)	\$
Past Due Water/Taxes	\$
Insurance (Homeowners, Flood, PMI)	\$
Other Debts	\$
Other Loans	\$
Other Loans	\$
Total Secured Debt	\$

Unsecured Debts (Monthly Payments)	
Credit Card 1	\$
Credit Card 2	\$
Credit Card 3	\$
Credit Card 4	\$
Credit Card 5	\$
Credit Card 6	\$
Credit Card 7	\$
Personal Loan 1	\$
Personal Loan 2	\$
Medical Bill Payment	\$
Other	\$
Total Unsecured Debt	\$

Monthly Living Expenses	
Alimony/Child Support	\$
Auto Gas and Repair	\$
Auto Insurance	\$
Cable TV/Satellite Fees	\$
Charitable Contributions	\$
Child Care	\$

Summary	
Total Net Income	\$
Total Monthly Living Expenses(-)	\$
Total Secured Debt(-)	\$
Total Unsecured Debt(-)	\$
Surplus or Shortage	\$

Children's Activities	\$
Clothing Maintenance	\$
Clothing Purchase	\$
Electric Bill	\$
Food (In-home/Groceries)	\$
Gas and Oil Bill	\$
Insurance (non-payroll reductions)	\$
Household Items	\$
Internet Access	\$
Property Services	\$
Subscriptions	\$
Telephone/Cell Phone	\$
Tuition and School Supplies	\$
Other Expenses	\$
Other Expenses	\$
Total Monthly Living Expenses	\$

Submitted this _____ day of 20____

By: Signature of Borrower Date

By: Signature of Co-Borrower Date