

# INCOME & EXPENSES SUMMARY

The following information is requested to determine your eligibility for hardship/unemployment deferment, forbearance, or a revision of your repayment schedule. The information you provide will remain confidential, however, we reserve the right to use this information if collection efforts become necessary. We also reserve the right to use a credit report to verify the information you provide.

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ (home)  
                  \_\_\_\_\_ (work)  
                  \_\_\_\_\_ (cell)

Account Number(s): \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_

### 1. Marital Status:

- Single
- Married
- Widow(er)
- Separated/Divorced

### 2. Number of Dependents: \_\_\_\_\_

Relationship: \_\_\_\_\_ Age: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### 3. Monthly Income from ALL Sources\*:

Gross Monthly Salary/Wages \$ \_\_\_\_\_  
Child Support \$ \_\_\_\_\_  
Alimony/Support \$ \_\_\_\_\_  
Unemployment \$ \_\_\_\_\_  
Public Assistance \$ \_\_\_\_\_  
Social Security/Veteran \$ \_\_\_\_\_  
Stocks, Bonds & Investments \$ \_\_\_\_\_  
Other: \_\_\_\_\_ \$ \_\_\_\_\_  
**Total Monthly Income:** \$ \_\_\_\_\_

4. Checking Account Balance: \$ \_\_\_\_\_

5. Savings Account Balance: \$ \_\_\_\_\_

### 6. Monthly Expenses:

Rent/Mortgage: \$ \_\_\_\_\_  
Utilities: \$ \_\_\_\_\_  
Child Care: \$ \_\_\_\_\_  
Car Payments: \$ \_\_\_\_\_  
Other Vehicle(s) \$ \_\_\_\_\_  
Public Transportation: \$ \_\_\_\_\_  
Insurance: \$ \_\_\_\_\_  
Telephone: \$ \_\_\_\_\_  
Cellular Phone/Pager: \$ \_\_\_\_\_  
Food: \$ \_\_\_\_\_  
Credit Card(s) \$ \_\_\_\_\_  
Other Charge Accounts: \$ \_\_\_\_\_  
Medical: \$ \_\_\_\_\_  
Cable/Satellite TV: \$ \_\_\_\_\_  
Entertainment: \$ \_\_\_\_\_  
Clothing: \$ \_\_\_\_\_  
Dry Cleaning: \$ \_\_\_\_\_  
Cleaning/Yard Service: \$ \_\_\_\_\_  
Other: \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
**Total Monthly Expenses:** \$ \_\_\_\_\_

\*Attach documentation to substantiate all income AND expense entries.

inc & exp sum (6-09)