



Financial Analysis Worksheet

Please take a few minutes to complete this form. To ensure you get a fast approval and the best service possible, please be as detailed and accurate as you can. If you have any questions please call your Equity Specialist.

Creditors to Be Paid Off (For example: Credit Cards, Auto Loans, Student Loans, etc.)

NAME OF CREDITOR	ACCOUNT NUMBER	CURRENT BALANCE	MONTHLY PAYMENT
TOTAL FOR CONSOLIDATING YOUR DEBT ▶			

Home Improvement Costs

If you plan to make some improvements around your home or another property, please list those improvements (i.e., new kitchen cabinets, new pool, etc.). Please be as accurate as possible.

PROJECT TYPE / DETAILS	ESTIMATED COST
TOTAL FOR HOME IMPROVEMENT ▶	

Additional Cash

Most customers elect to take out extra cash. You can use this additional cash for any purpose.

PURPOSE	ESTIMATED AMOUNT
TOTAL ADDITIONAL CASH ▶	

TOTAL BALANCE FOR CONSOLIDATING YOUR DEBT ▶	
TOTAL FOR HOME IMPROVEMENT ▶	
TOTAL ADDITIONAL CASH ▶	
TOTAL FUNDS NEEDED ▶	