Personal Financial Overview

plan
Prepare, Learn, Act...Now!

Personal Information

Please check the following services that interest you.

- ❑ Financial Checkup
- ❑ Debt Reduction
- ❑ Retirement
- ❑ Education
- ❑ Trust/Investment Services* *(fee may apply)*
- ❑ Other

Your Information
Name
Address
City/State/ZIP
Preferred Phone Number
E–mail Address
Spouse/Partner Information
Name
E-mail Address

Your Income Information	
Your Gross Income	$
NET (TAKE HOME) PAY	$
Other Income (child support, etc.)	$
How often do you get paid?	❑ Weekly ❑ Semi-Monthly ❑ Bi-weekly ❑ Monthly
Spouse/Partner Income Information	
Your Gross Income	$
NET (TAKE HOME) PAY	$
Other Income (child support, etc.)	$
How often do you get paid?	❑ Weekly ❑ Semi-Monthly ❑ Bi-weekly ❑ Monthly

Household Monthly Expenses	
Expense	**Monthly Amount**
Savings/Retirement/General	$
Household Rent/Storage	$
Food (groceries, vending machines)	$
Telephone/Communications	$
Cable/Internet	$
Electricity/Gas/Oil	$
Water/Sewer/Garbage Collection	$
Dependent Care (child, elderly)	$
Transportation (gas, oil)	$
Medical Prescriptions	$
Insurance (life, health, disability, auto)	$
Gifts/Donations (church, charity)	$
Clothing	$
Personal (tobacco, toiletries, dry cleaning)	$
Beauty/Barber Shop	$
Entertainment (movies, video rentals)	$
Dining Out	$
Child Support/Alimony	$
Other (please list)	$
	$
	$
	$
	$
	$
Total Monthly Expenses	$ 0.00

Note: Items in parentheses are examples; your particular items may vary.

**Trust services offered through MEMBERS® Trust Company.*

Household Periodic Expenses	
Expense	**Annual Amount**
Automobile Maintenance	$
Vacation/Special Entertainment	$
Property Taxes/Property Insurance	$
Tuition/Books/Fees	$
Subscriptions/Dues	$
Veterinarian Bill/Pet Grooming	$
Home Improvements	$
Other (please list)	$
	$
	$
	$
	$
	$
Total Periodic Expenses	$ 0.00

Note: Items in parentheses are examples; your particular items may vary.

Household Debt Information (Please include all installment loans, store accounts, credit cards, medical bills and mortgage.)			
Creditor	**APR**	**Balance**	**Monthly Payment**

Get the financial planning process underway. Now that you've finished your personal financial overview, submit your form through one of three convenient options.

E-mail

Save this PDF and attach it to an e-mail:
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Mail

Print a copy and mail it to:
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