# Personal Income and Expense Form

To be completed by each holder of 20% or more of applicant company.

Name: _____ Spouse's Name: _____

| **SOURCES OF INCOME** | ANNUAL HISTORIC | ANNUAL PROJECTED |
|---|---|---|
| Gross Salary (Principal): | | |
| Gross Salary (Spouse): | | |
| Rental Property Income Received (Gross): | | |
| Interest Income (Recurring): | | |
| Dividend Income (Recurring): | | |
| Other Income (Recurring): _____ | | |
| **TOTAL SOURCES OF INCOME:** | | |

| **USES OF INCOME (EXPENSES)** | MONTHLY EXPENSE | ANNUAL EXPENSE |
|---|---|---|
| Mortgage Expense (P&I) / Rent Expense: | | |
| Rental Property Mortgage Expense: | | |
| Rental Property Expenses (less depreciation & interest): | | |
| Auto Loans (All): | | |
| Installment Loans (All): | | |
| Revolving Lines of Credit / Credit Cards (All): | | |
| Utilities (Gas, Electric, Water, etc.): | | |
| Phone, Cable & Internet: | | |
| Income Taxes (Historical Rate): | | |
| Property Taxes (Historical Rate): | | |
| Alimony and Child Support (if applicable): | | |
| Tuition Payments: | | |
| Medical Expenses: | | |
| Insurance Payments (real estate, car, health, etc.): | | |
| Food (household): | | |
| Clothing (household): | | |
| Other Expenses: | | |
| **TOTAL USES OF INCOME (EXPENSES):** | | |
| **CASH FLOW SURPLUS (DEFICIT):** | | |

Signature: _____ Date: _____