**Financial Evaluation Form California**

**Personal Information:  
Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Social Security Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Employment Details:  
Employer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Annual Income: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Employment Duration: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Income and Expenses:**

| **Income Source** | **Monthly Amount ($)** | **Expense Type** | **Monthly Amount ($)** |
| --- | --- | --- | --- |
| **Salary** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Rent/Mortgage** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Self-Employment** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Utilities** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Investments** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Medical Expenses** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Other Income** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Transportation** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

**Assets and Liabilities:**

| **Asset Type** | **Value ($)** | **Liability Type** | **Amount Owed ($)** |
| --- | --- | --- | --- |
| **Bank Accounts** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Credit Cards** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Real Estate** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Loans** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Vehicles** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **Other Liabilities** | **$\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

**Declaration:  
I declare that all information provided is true and accurate to the best of my knowledge.**

**Applicant’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**