



## "WE CAN HELP" Financial Statement

Return by mail to: GTE Financial, Attn: We Can Help, P.O. Box 172488, Tampa FL 33672-0488, or fax to 813.414.8114

<b>Account Information:</b>	Member Number: _____ E-Mail Address: _____ <b>In order to meet your financial goals, what payment can you afford on this loan? \$</b> _____			
<b>Member Information:</b>	Rent or Own: _____			
Borrower's Name: _____ SSN: _____ DOB: _____ Co-Borrower's Name: _____ SSN: _____ DOB: _____ Address: _____ <div style="display: flex; justify-content: space-between;"> <span>No.</span> <span>Street</span> <span>Apt</span> <span>City</span> <span>State</span> <span>Zip</span> </div> How Long at Current Residence: _____ Mthly Housing Expense: \$ _____				
<b>Contact Information:</b>	Best Time to Contact: _____			
Home Phone: _____ Cell Phone: _____ Work Phone: _____				
<b>Collateral Information:</b>	Auto (Year, Make & Model): _____ Mileage _____			
If Real Estate – Property Address: _____ <div style="display: flex; justify-content: space-between;"> <span>No.</span> <span>Street</span> <span>Apt</span> <span>City</span> <span>State</span> <span>Zip</span> </div> Other Collateral _____				
<b>Job Information:</b>	Borrower - Self-Employed <input type="checkbox"/> Yes or <input type="checkbox"/> No    Co-Borrower - Self-Employed <input type="checkbox"/> Yes or <input type="checkbox"/> No			
Borrower: _____ \$ _____ yrs. _____ mos. _____ <div style="display: flex; justify-content: space-between;"> <span>Occupation</span> <span>Company</span> <span>Gross Monthly income</span> <span>Time on Job</span> </div> Co-Borrower: _____ \$ _____ yrs. _____ mos. _____ <div style="display: flex; justify-content: space-between;"> <span>Occupation</span> <span>Company</span> <span>Gross Monthly income</span> <span>Time on Job</span> </div> Additional Income*: \$ _____ Per Month    Source: _____ Additional Income*: \$ _____ Per Month    Source: _____  Unemployment Information: Start Date: _____ Wages: \$ _____ Social Security/Retirement Income: \$ _____ <small>* Notice: Alimony, child support or separate maintenance income need not be revealed if borrowers do not choose to have it considered for approval of a loan workout.</small>				
<b>Asset &amp; Liability Information:</b>	Please feel free to provide information below on a separate piece of paper if needed.			
Asset Type	Estimated Value	Liability Type	Payment/Month	Balance Due
Primary Residence	\$	Mortgage Payment	\$	\$
Secondary/Rental Residence	\$	Home Equity Payment	\$	\$
Other Vehicle	\$	Taxes/Ins – if not escrowed	\$	\$
Savings/Money market	\$	Other Auto Payments	\$	\$
Checking Account	\$	Other Mortgages	\$	\$
IRA/401K/Retirement	\$	Alimony/Child Support	\$	\$
Other Investments	\$	Personal Loan/Credit Cards	\$	\$

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*Before signing this document, make sure you have completed the following checklist:*

- Hardship Affidavit Letter** stating reason for this loan workout request. Please provide as much detail as possible. Also, fill out attached budget sheet.
- Copies of most recent pay stubs (1 month worth).** If self-employed, please attach a copy of your last 2 years Federal Tax Returns with all schedules, including Schedule C and Business Bank Statement.
- Banks statements (last 2 months)**
- If a secured loan, provide a proof of insurance.**

*I (we) agree that the financial information provided is an accurate statement of my (our) financial status. I (we) understand and knowledge that any action taken by the lender of my (our) mortgage loan on my (our) behalf will be made in strict reliance on the financial information provided. My (Our) signature(s) below grants the holder of my (our) mortgage/auto/other secured/unsecured loan the authority to confirm the information I (we) have disclosed in this financial statement, to verify that it is accurate by ordering a credit report, and to contact my real estate agent and/or credit counseling service representative (if applicable).*

Borrower's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Borrower's Signature: \_\_\_\_\_ Date: \_\_\_\_\_





**YOUR MONTHLY BUDGET**

*In order to assist you with your financial needs, please complete the following household budget worksheet as accurately as possible. This process will allow GTE Financial to analyze your situation and recommend a payment that best fits your budget.*

**Monthly Budget**

**Income & Expense Explanation**

**Total Gross Monthly Income** \_\_\_\_\_

*Wages, alimony, child support, pensions, SSI, etc. before any deductions*

**Income Deductions**

Taxes \_\_\_\_\_  
Savings Plan \_\_\_\_\_  
Other deductions \_\_\_\_\_

*Federal, State, FICA.  
401K, 403b, ESPP, 528  
Medical, dental, vision, life insurance*

Total Income Deductions \_\_\_\_\_

**Monthly Net Income** \_\_\_\_\_

**Monthly Household Expenses**

Rent or Mortgage payment \_\_\_\_\_  
Other Housing expenses \_\_\_\_\_  
Home Owners/Condo Association fees \_\_\_\_\_  
Utilities \_\_\_\_\_  
Telephone/cell/cable/internet services \_\_\_\_\_  
Home maintenance \_\_\_\_\_  
Transportation expenses \_\_\_\_\_  
Food & groceries \_\_\_\_\_  
Dining out expenses \_\_\_\_\_  
Clothing expenses \_\_\_\_\_  
Books, periodicals, subscriptions \_\_\_\_\_  
Monthly Debt Obligations \_\_\_\_\_  
    Student loan payments \_\_\_\_\_  
    Auto loan payments \_\_\_\_\_  
    Credit card payments \_\_\_\_\_  
    Second mortgage payment \_\_\_\_\_  
    Other installment payments \_\_\_\_\_  
    Boat/Motorcycle/RV payment \_\_\_\_\_  
Child care expense \_\_\_\_\_  
Alimony, child support, maintenance \_\_\_\_\_  
Pet expenses \_\_\_\_\_  
Lawn maintenance expense \_\_\_\_\_  
Hobbies/entertainment expenses \_\_\_\_\_  
Other Non-employer medical expense \_\_\_\_\_  
Total Household Expenses \_\_\_\_\_

*Property taxes, flood & homeowners insurance  
If paid quarterly or annually, divide by 4 or 12  
Includes water, sewer, garbage, electricity  
Laundry, toiletries, housekeeping, home security  
Gas, auto insurance, license fees, parking, bus  
Includes lunches at work, restaurant expenses  
Other shopping related expenses  
Includes college books  
Sallie Mae or other student loan expenses  
Minimum payments  
Includes babysitting expenses  
Food, vet, supplies, pet insurance  
Bowling, gym membership, cigarettes & tobacco  
Life insurance, disability premiums*

**Amount available for savings/investment** \_\_\_\_\_

*Household cash flow (Monthly net income – expenses)*



