



Financial Assistance Worksheet

If you are looking for financial assistance from a community agency, use this form to log your personal and financial data. It will make your first contact with the agency more productive.

Information Often Required When Applying for Financial Assistance

Monthly Expenses	Amount
Rent or mortgage payment	\$
Food and restaurant	\$
Utilities (phone, electric, gas, water)	\$
Insurance - life and health	\$
Clothing and laundry	\$
Education, tuition payments	\$
Child care	\$
Transportation, car payments	\$
Medical and dental	\$
Total Expenses	\$

Additional Financial and Personal Information

Total household earnings per month	\$
Total savings and investments	\$
Total cash on hand	\$
Assessed value of home	\$
Name and address of mortgage company	
Year and make of car	
Amount of lien (if any) on car	\$
Tax Returns (federal, state and local)	

Items to take to the First Appointment

- Proof of earned income
- Proof of residency
- Record of debts
- Record of house payments, insurance, and taxes or rent payment
- Record of any other source of income (bonds, investments, social security)
- Record of child care payments
- Immigration and naturalization service papers for all members of home who are not citizens
- Proof of utility expenses
- Birth dates and social security numbers of household members