

Assuria Life (T&) Ltd

Financial Status Report as at.....

ASSETS	Present	Projected
Savings (Cash & Chequing Account)	\$.....	\$.....
Motor Car, Furniture etc (cash value)	\$.....	\$.....
Real Estate (cash value)	\$.....	\$.....
Life Insurance (cash value)	\$.....	\$.....
Investments (Shares, Credit Union, etc)	\$.....	\$.....
Other (Name)	\$.....	\$.....
Total Assets	\$.....	\$.....

LIABILITIES	Present	Projected
Mortgage (s) on home	\$.....	\$.....
Mortgage (s) on other property	\$.....	\$.....
Bills presently due	\$.....	\$.....
Bills past due	\$.....	\$.....
Loan	\$.....	\$.....
Loan	\$.....	\$.....
Other (Name)	\$.....	\$.....
Total Liabilities	\$.....	\$.....
Net worth (total assets-total liabilities)	\$.....	\$.....

Signature..... Date.....

Signature..... Date.....

Assuria Life (T&T) Ltd

Financial Status Report (cont'd)

Monthly Income/Expenses

INCOME	Present	Projected
(1) Present Salary (Husband)	\$.....	\$.....
(Wife)	\$.....	\$.....
(2) Other Income (Specify)	\$.....	\$.....
(3) Totally monthly income	\$.....	\$.....
EXPENSES		
(4) SHELTER	Present	Projected
(a) Mortgage or rent	\$.....	\$.....
(b) Rates and Taxes	\$.....	\$.....
(c) Maintenance & repairs to property	\$.....	\$.....
(d) Maintenance & repairs to home appliances	\$.....	\$.....
(e) Fire Insurance	\$.....	\$.....
(f) Electricity	\$.....	\$.....
(5) LIVING EXPENSES		
(a) Food	\$.....	\$.....
(b) Clothing	\$.....	\$.....
(c) Life Insurance	\$.....	\$.....
(d) Medical & Dental	\$.....	\$.....
(e) Telephone/Cable/Internet	\$.....	\$.....
(f) Entertainment & Social	\$.....	\$.....
(g) P.A.Y.E.	\$.....	\$.....
(h) N.I.S./H.Surcharge	\$.....	\$.....
(i) Pension	\$.....	\$.....
(j) Other (specify)	\$.....	\$.....
(6) TRANSPORTATION		
(a) Car Insurance	\$.....	\$.....
(b) Car operating expenses	\$.....	\$.....
(c) Public transportation	\$.....	\$.....
(7) INSTALMENT OBLIGATIONS		
(a) For children	\$.....	\$.....
(b) For car	\$.....	\$.....
(c) For furniture	\$.....	\$.....
(d) Public transportation	\$.....	\$.....
(8) MISCELLANEOUS		
(a) Others (specify)	\$.....	\$.....
(b) Others (specify)	\$.....	\$.....
(c) Others (specify)	\$.....	\$.....
(9) For monthly savings		
(10) Total monthly commitments		
Sum of (4) to (9)	\$.....	\$.....
(11) Residue (3) minus (10)	\$.....	\$.....