



Financial Disclosure

Information

Full Name of Seeker: \_\_\_\_\_

Date: \_\_\_/\_\_\_/\_\_\_\_\_ Date of Birth: \_\_\_/\_\_\_/\_\_\_\_\_ SSN: \_\_\_/\_\_\_/\_\_\_\_\_

Number of incomes in family: \_\_\_\_\_

Number and Ages of Dependents: \_\_\_\_\_

Assets

- Cash on hand \$ \_\_\_\_\_
- Checking account \$ \_\_\_\_\_
- Savings account \$ \_\_\_\_\_
- Savings bonds \$ \_\_\_\_\_
- Money market funds \$ \_\_\_\_\_
- Certificates of deposit \$ \_\_\_\_\_
- Cash value of life insurance \$ \_\_\_\_\_
- Pensions and similar assets \$ \_\_\_\_\_
- Market value of home \$ \_\_\_\_\_
- Mutual funds \$ \_\_\_\_\_
- Tax-deferred savings (403b, IRA, 401k) \$ \_\_\_\_\_
- Stocks/bonds \$ \_\_\_\_\_
- Certificates of deposit \$ \_\_\_\_\_
- Rental property \$ \_\_\_\_\_
- Equity in businesses you own \$ \_\_\_\_\_
- Value of trust fund \$ \_\_\_\_\_
- Automobiles/trucks \$ \_\_\_\_\_
- Boats/recreational vehicles \$ \_\_\_\_\_
- Furnishings \$ \_\_\_\_\_
- Antiques \$ \_\_\_\_\_
- Collectibles (art, stamps, coins, etc.) \$ \_\_\_\_\_
- Jewelry/gold/silver \$ \_\_\_\_\_
- Other assets (describe on additional sheet) \$ \_\_\_\_\_

**TOTAL ASSETS** \$ \_\_\_\_\_



## Financial Disclosure

### Liabilities

Unpaid bills	\$ _____	
Credit card balances	\$ _____	
Principal residence mortgage	\$ _____	
Other mortgages	\$ _____	
Equity line of credit	\$ _____	
Education loans-aspirant	\$ _____	
Education loans-other family members	\$ _____	
Automobile loans	\$ _____	
Alimony/child support	\$ _____	
Personal loans	\$ _____	
Other liabilities (describe on additional sheet)	\$ _____	
<b>TOTAL LIABILITIES</b>		\$ _____

### Net Worth Calculation

Total Assets	\$ _____	
(minus) Total Liabilities	\$ _____	
<b>(equals) Net Worth</b>		\$ _____

### Other Data

Please provide details on any other information pertinent to your assets and liabilities including, but not limited to, prior and/or current bankruptcies.

### Submission

Please submit this form to the office of the bishop either by mail or email, [lnichols@dioet.org](mailto:lnichols@dioet.org), along with a copy of your most recent IRS Form 1040.

Note: You may want to keep in mind anticipated family gifts or bequests. If applicable, in completing the questions on this form, you may wish to review marital vs. non-marital assets and expenses.