



THE EPISCOPAL DIOCESE OF EAST TENNESSEE

Reconciling All Things in Christ

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)	\$ _____	
TOTAL LIABILITIES		\$ _____

Net Worth Calculation

Total Assets	\$ _____	
(minus) Total Liabilities	\$ _____	
(equals) Net Worth		\$ _____

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, jhumber@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.