

Personal Financial Statement

This information will be used to evaluate your ability to pay what you owe, and to determine if a payment agreement is appropriate and what payment terms are acceptable. This information may be used for collection purposes. We are allowed to require Social Security numbers under 42 USC 405 (c)(2)(C)(i). You are not legally required to provide the information requested; however, if no information is provided or the information is insufficient to make a determination, your request will be denied. Before requesting an installment agreement, you should consider less costly alternatives, such as a bank loan.

Please print	Your full name			Spouse's full name			
	Your Social Security number		Your birth date	Spouse's Social Security number		Spouse's birth date	
	Your address			Spouse's address (if different)			
	City	State	Zip code	City	State	Zip code	
	Home phone number () ()		Work phone number () ()		Spouse's home phone number () ()		Spouse's work phone number () ()

Employment	You <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time			Spouse <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time		
	Your employer or business name		Occupation	Spouse's employer or business name		Occupation
	Address			Address		
	City	State	Zip code	City	State	Zip code
	Professional licenses held by you		Renewal dates	Professional licenses held by spouse		Renewal dates

Real estate (home, land, cabin). Attach your property tax statements.

Address	City	State	County	Mortgage balance	Current value	Paid to	Minimum payment

Bank accounts (credit unions, money market, stocks, bonds, 401[k]s, IRAs, etc.) Attach additional sheets if necessary.

Name and address of institution	Type of account	Account number	Name on account	Balance/value
	<input type="checkbox"/> checking <input type="checkbox"/> savings <input type="checkbox"/> other			
	<input type="checkbox"/> checking <input type="checkbox"/> savings <input type="checkbox"/> other			
	<input type="checkbox"/> checking <input type="checkbox"/> savings <input type="checkbox"/> other			

Motor vehicles (cars, boats, RVs, motor cycles, snowmobiles, ATVs, etc.) Attach additional sheets if necessary.

Year/make	Model	Date acquired	Financed by	Balance due	Payoff date	Minimum monthly payment

Complete the other side.

