

BRYN GWELED HOMESTEADS FINANCIAL QUESTIONNAIRE

Membership in Bryn Gweled requires a large commitment of time for applicants and members alike. Because of this, and the fact that membership involves a shared financial responsibility, we ask that you submit the following financial information. This information is kept confidential, seen only by the President, Treasurer, and (in the case of new member applicants) the Membership Chairperson, and is destroyed after review. **PLEASE SUBMIT A CURRENT CREDIT REPORT WITH THIS FORM.** It is the duty of the applicant(s) to inform the president of any changes in financial status during the mortgage/application process.

CAPITAL ASSETS

Cash _____
 Investments (not retirement related) _____
 Investments (IRA, 401-k, pension plans, etc.) _____
 Real estate (current value residence(s)) _____
 Vehicles _____
 Personal Property _____
 Other _____
 TOTAL CAPITAL ASSETS. \$ _____

INCOME (ANNUAL- AFTER DEDUCTIONS)

Applicant's salary _____
 Joint applicant's salary _____
 Other _____
 TOTAL ANNUAL INCOME. \$ _____

EXPENSES (ANNUAL ESTIMATES)

Mortgage balance _____ Mortgage payments _____
 Rent _____
 Utilities _____
 Taxes (real estate) _____
 Food _____
 Clothing _____
 Child care _____
 Auto/transportation _____
 Insurance (home, car, life, etc.) _____
 Tuition & expenses _____
 Other (including loan payments, alimony, etc.) _____
 TOTAL ANNUAL EXPENSES. \$ _____

INSURANCE COVERAGE

Member/Applicant - Life Insurance policy type _____ Face amount \$ _____
 Joint member/applicant - Life Insurance policy type _____ Face amount \$ _____
 Major medical/hospitalization _____
 Other personal insurance _____

CREDIT CARDS, AUTO, PERSONAL, AND STUDENT LOANS - TOTAL OUTSTANDING BALANCE: _____
 Please provide details on an attached page along with balances due.

1. What housing price range would you consider affordable (NEW APPLICANTS)? _____
2. How do you expect to finance your house (NEW APPLICANTS)? _____
3. Have you ever been involved in bankruptcy proceedings, personal judgements, foreclosure suits, unpaid taxes? _____
4. Do you expect other capital expenditures? _____

If you answered yes to question 3 or 4, please explain on an attached page.

Signed _____ Date _____
 Signed _____ Date _____