

**FINANCIAL WORKSHEET**

I, \_\_\_\_\_, being duly sworn, over 18 years of age, and competent to testify on these matters say:

1. I presently solely own the following real properties in Vermont and have provided the addresses:

\_\_\_\_\_

2. I presently solely own the following real properties in states other than Vermont and have provided the addresses:

\_\_\_\_\_

3. I presently jointly own the following real property with someone else and have provided the addresses of these properties and the name and contact information for the person that I own them jointly with:

\_\_\_\_\_

4. The following properties listed above are rental property, and I have provided the approximate monthly rental income I or my agent on my behalf receives:

\_\_\_\_\_

5. I presently have the following bank accounts and have provided the name of the bank, the account number, the approximate amount in the bank, and whether I am the sole account owner or if another person also owns this account:

Bank name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount in account: \_\_\_\_\_  
Sole or Joint (circle one) and identify other account holder if applicable: \_\_\_\_\_

Bank name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount in account: \_\_\_\_\_  
Sole or Joint (circle one) and identify other account holder if applicable: \_\_\_\_\_

Bank name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount in account: \_\_\_\_\_  
Sole or Joint (circle one) and identify other account holder if applicable: \_\_\_\_\_

6. I list below any stocks, bonds, annuities, pensions, or CDs I presently own or have a right to collect income or principle from, their associated account numbers and approximate value:

Type of Asset	Company	Account Number	Monetary Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

7. I (or my agent on my behalf) do or not receive (circle one), social security payments in the amount of \$\_\_ per month.

8. Regarding any property or assets listed in paragraphs 1-7 above, neither myself, my agent, or a joint owner has sold, traded, transferred, or gifted these properties, funds, or assets away in the last 60 months.

I have provided this information to the best of my knowledge and belief.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature