



COMMON WEALTH CHARLOTTE

uncommon financial solutions for low income families

Name: _____

Date: _____

Advisor: _____

Employment Income

Job:	
Job:	
Job:	
Employment Income	

Other Income

Child Support	
SSI	
Other	
Other Income	

Housing

Rent/Mortgage	
Utilities	
Cell Phone	
Cable/Internet	
Housing	

Food

Groceries	
Eat Out/Take Out	
(EBT)	
Food	

Transportation

Car Payment	
Car Insurance	
Gas	
Bus Pass	
Uber/Lyft	
Transportation	

Other

Household	
Child Care	
Tithe/Charity	
Other:	
Other:	
Other	

Debt (per month)

Credit Card 1	
Credit Card 2	
Student Loans	
Furniture/Appliances	
Installment Loan	
Payday/Title Loan	
Other	
Debt (per month)	

Totals

Employment Income	
Other Income	
Housing	
Transportation	
Debt	
Food	
Other	
Over/Under	

Notes:

Total Income	\$
Total Fixed Expenses	\$

Intentional Spending Analysis:

Over/Under: \$ _____

Financial Advisor Loan Evaluation

Totals		Data	
Employment Income		Employment (years)	
Other Income		Residence (years)	
Housing		Fixed/Income %	
Transportation		# of Children	
Debt		Married?	
Food		Collection (total)	
Other		Charge Offs (total)	
OVER/UNDER		Savings (total balance)	