

# Financial Assessment Form Sample for Loan Application

Use this **financial assessment form** sample to accurately evaluate an applicant's financial status for a loan application. It helps lenders gather essential income, expense, and asset information to determine loan eligibility. Streamlining this process ensures informed and efficient decision-making.

## Applicant Information

Full Name	<input type="text"/>
Date of Birth	<input type="text"/>
Contact Number	<input type="text"/>
Email Address	<input type="text"/>
Address	<input type="text"/>

## Employment Information

Employer Name	<input type="text"/>
Position/Title	<input type="text"/>
Years Employed	<input type="text"/>
Monthly Salary	<input type="text"/>

## Income Details

Other Income Source	<input type="text"/> e.g. rental, investments	Monthly Amount	<input type="text"/>
<input type="button" value="Add More Income Sources"/>			

## Monthly Expenses

Expense Type	Monthly Amount
Rent/Mortgage	<input type="text"/>
Utilities	<input type="text"/>
Food	<input type="text"/>
Transportation	<input type="text"/>
Loan Payments	<input type="text"/>
Other	<input type="text"/>

## Assets

Asset Type	<input type="text"/> e.g. Savings, Property	Value	<input type="text"/>
<input type="button" value="Add More Assets"/>			

## Liabilities

<b>Debt Type</b>	e.g. Credit Card, Auto Loan	<b>Outstanding Amount</b>	
<a href="#">Add More Liabilities</a>			

## Loan Details

<b>Loan Amount Requested</b>	
<b>Purpose of Loan</b>	

## Declaration & Signature

I hereby declare that the information provided above is true and accurate to the best of my knowledge.

<b>Applicant Signature</b>	
<b>Date</b>	

[Submit Application](#)