

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

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

Liabilities

Debt Type	<input type="text" value="e.g. Credit Card, Auto Loan"/>	Outstanding Amount	<input type="text"/>
<div>Add More Liabilities</div>			

Loan Details

Loan Amount Requested	<input type="text"/>
Purpose of Loan	<input type="text"/>

Declaration & Signature

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

Applicant Signature	<input type="text"/>
Date	<input type="text"/>

Submit Application