

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