



Financial1Educators MTA Profile Worksheet

Instructions

Step 1:

Print off this form.

Step 2:

Pencil in applicable amounts.

Step 3:

Go to www.financial1educators.com and click New Profile.

Step 4:

Complete the profile.

Pay particular attention to the following figures.

- **Net Income:** This is your monthly take home pay (i.e. what is written on your check)
- **Mortgage Monthly Payment:** Principal & Interest ONLY; **Do not include Escrow**
- **Car Leases:** Put only vehicle lease information here. If you have a car loan put that on page 3 in the *Bank Notes* section.
- **Escrow:** This is your property taxes and home insurance payment
- **Presents & Gifts:** This includes Christmas, holidays, birthdays, weddings, etc. (Divide your Christmas/holiday expenses by 12 months)
- **Donations:** Include regular monthly or annual donations to charity or church
- **Pre-Tax Items:** Under the heading *Monthly Personal & Family Expenses* check the box IF the expense is deducted from your paycheck PRE-TAX; or before you have calculated your NET monthly income.

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Contact Information	
Name	
Phone	
Address	
City/State/ ZIP	
Email	
Referral #	

NET Monthly Income	
Primary	\$
Secondary	\$
	\$

Assets	
Checking	\$
Savings	\$
IRAs	\$
401K	\$
Stocks & Bonds	\$
	\$

Note additional assets on the last page of this worksheet. The online profile can accept unlimited assets.

Residence 1	
Monthly Payment	\$
Escrow (Tax & Ins.)	\$
Current Balance	\$
Estimated Value	\$
Loan Type (circle one)	Fixed / Interest Only
Rate	%
Term (e.g 15yr, 30yr)	Years
Years left (e.g. 26)	Years

Residence 1	
Months left (e.g. 6)	Months

Residence 2	
Monthly Payment	\$
Escrow (Tax & Ins.)	\$
Current Balance	\$
Estimated Value	\$
Loan Type (circle one)	Fixed / Interest Only
Rate	%
Term (e.g 15yr, 30yr)	Years
Years left (e.g. 26)	Years
Months left (e.g. 6)	Months

Residence 3	
Monthly Payment	\$
Escrow (Tax & Ins.)	\$
Current Balance	\$
Estimated Value	\$
Loan Type (circle one)	Fixed / Interest Only
Rate	%
Term (e.g 15yr, 30yr)	Years
Years left (e.g. 26)	Years
Months left (e.g. 6)	Months

Monthly Household Expenses	
Food & General Goods	\$
Home maintenance	\$
Electricity	\$
Gas (home heating)	\$
Water	\$
Waste	\$
TV/Cable/Sat	\$

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Loans (Car, 2nd Mortgages, Boat, etc.)				
Name	Current Balance	Rate	Minimum Payment	Type (circle one)
	\$	%	\$	Fixed/Interest Only
	\$	%	\$	Fixed/Interest Only
	\$	%	\$	Fixed/Interest Only
	\$	%	\$	Fixed/Interest Only
	\$	%	\$	Fixed/Interest Only
	\$	%	\$	Fixed/Interest Only

Note additional loans on the last page of this worksheet. The online profile can accept unlimited loans.

Revolving Accounts (Credit Cards, Open ended Home Equity Lines, etc.)			
Name	Current Balance	Rate	Monthly Min. Payment
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$
	\$	%	\$

Note additional credit lines on the last page of this worksheet. The online profile can accept unlimited credit lines.

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Leases (Auto, Apartment, etc.)		
Name	Monthly Payment	Remaining Months
	\$	
	\$	
	\$	
	\$	
	\$	
Note additional leases as needed. The online profile can accept unlimited leases.		

NOTES: