FRANCHISE TAX BOARD

INFORMATION WILL BE VERIFIED (FILL OUT FINANCIAL STATEMENT COMPLETELY)

Taxpayer: Address: City, State, Zip: Driver License Number:	Phone Number (Circle best daytime number): Home: Work: Spouse's Work: Personal Fax:

Spouse: Address: City, State, Zip: Driver License Number:	Social Security Number Taxpayer: Spouse:	Date of Birth Taxpayer: Spouse:

LIST ALL DEPENDENTS AND NON-RELATIVES LIVING WITH YOU. If you need additional space, attach a separate sheet

Name: Age: Relationship: Name: Age: Relationship: Name: Age: Relationship:	Name: Age: Relationship: Name: Age: Relationship: Name: Age: Relationship:

EMPLOYMENT INFORMATION

TAXPAYER	SPOUSE
Employer/Business Name: Address: City, State, Zip: Employer/Business Phone Number: Employer/Business Fax Number: Occupation/Profession: How long employed: Marital Status on your W-4: ☐ Single ☐ Married Number of exemptions you claim:	Employer/Business Name: Address: City, State, Zip: Employer/Business Phone Number: Employer/Business Fax Number: Occupation/Profession: How long employed: Marital Status on your W-4: ☐ Single ☐ Married Number of exemptions you claim:

BANK ACCOUNTS Including Savings & loans, Credit Unions, CD's, IRA's. If additional space is needed, attach a separate sheet.

Name of Institution	Address	Type of Account (Checking/Savings) (Joint/Separate)	Account Number	Balance

REAL ESTATE If additional space is needed, attach a separate sheet

Address/County of Property	Date Purchased	Current Value	Mortgage Balance	Paid to (Lender Name)
		$	$	
		$	$	
		$	$	

MOTOR VEHICLES If additional space is needed, attach a separate sheet.

Year, Make, and License Number	Date Purchased	Current Value	Loan Balance	Date loan will be paid off
1.		$	$	
2.		$	$	
3.		$	$	

LIFE INSURANCE If additional space is needed attach a separate sheet

Name of Company	Amount you can borrow on policy	Name of Company	Amount you can borrow on policy
	$		$

OTHER ASSETS Things you own or are buying, such as stocks, bonds, boats, etc. If additional space is needed, attach a separate sheet

Description	Current Value	Loan Balance	Date loan will be paid off
	$	$	
	$	$	
	$	$	