

## Debt Analysis Checklist

Mortgages	Current Balance	Current Interest Rate	Payment Amount	Original Balance	Mortgage start Date	Original Term	Home Equity Line of Credit?
	\$	%	\$	\$		\$	yes/no
	\$	%	\$	\$		\$	yes/no
	\$	%	\$	\$		\$	yes/no
Credit Cards, Lines of Credit	Current Balance	Current Interest Rate	Payment Amount	Credit Limit			
	\$	%	\$	\$			
	\$	%	\$	\$			
	\$	%	\$	\$			
	\$	%	\$	\$			
	\$	%	\$	\$			
Loans	Current Balance	Current Interest Rate	Payment Amount				
	\$	%	\$				
	\$	%	\$				
	\$	%	\$				
	\$	%	\$				
Income	Income Stream	Net Income	Interval				
		\$					
		\$					
		\$					
		\$					
Bank Accounts	Typical Balance	Checking or Savings?					
	\$	C/S					
	\$	C/S					
	\$	C/S					
	\$	C/S					
	\$	C/S					
Discretionary Income	Discretionary Income (monthly)						
	\$						