

# Financial Affidavit

Complete the financial affidavit and have it signed by a qualified accountant. Be prepared to show the following documents to your accountant: 1040, 1099, W2, SA100, P45, P60, recent bank statements (last 3 months) and credit card statements. If you are between the ages of 18 and 21, please submit your last three bank statements and last pay stub (if applicable), or a letter of dependency from your parents, with your completed affidavit form instead of an accountant's signature. Any omission or falsification of financial records will immediately invalidate the application before or after grant allocation.

The amounts listed below should be in US Dollars or Pounds Sterling.

Primary Applicant's full name(s) Please print

Secondary Applicant's full name(s) Please print

## ANNUAL INCOME (Gross Income - Salary or Wages)

1. Total Gross Income - Primary ☐ Monthly ☐ Annual \$/£

2. Total Gross Income - Secondary ☐ Monthly ☐ Annual \$/£

3. Net Investment Income \$/£

## ASSETS

4. Checking/Current Accounts \$/£

5. Savings Accounts \$/£

6. Cash and Short Term Investments \$/£

7. Stocks, Options, Commodity Contracts \$/£

8. Value of Vehicles Owned \$/£

9. Retirement Funds/Pension \$/£

10. Loans to Others and Accounts Receivable \$/£

11. Value of Interest in Any Business \$/£

12. Do you have assets of any kind held in trust for you or any member of your immediate family? ☐ Yes ☐ No

If yes, what is the value of the trust? \$/£

13. Do you receive any financial assistance from any person or organization (including family)? ☐ Yes ☐ No  
Sources

If yes, how much? \$/£

Will this assistance continue after you make Aliyah? \$/£

14. Other sources of income: e.g. tax shelter investments, collections, judgements, alimony, patents, social security.

Specify type:

Annual Income Received \$/£

## Real Estate (in North America, UK or abroad)

15. Principal Residence - Location

Market Value \$/£

16. Other Real Estate - Location

Market Value \$/£

17. Are you renting out property? ☐ Yes ☐ No

If so, what is your rental income? ☐ Monthly ☐ Annual \$/£

☐ Yes ☐ No

18. When making Aliyah, do you plan to sell or rent out your current home? ☐ Rent ☐ Sell

19. If selling, what sum do you expect to net (sale price less mortgage and commissions) upon the sale of your home? \$/£

A. Total Assets \$/£

Figure should be the total of line items 4-8, 11, and 13-17

## LIABILITIES

### Current

20. Notes Payable to Banks and Others \$/£

21. Credit Card Balance \$/£

20. Other Loans \$/£

Details

### Long Term

23. Car Loan: Total Owed \$/£

24. Student and Bank Loans: Total Owed \$/£

25. Unpaid Taxes \$/£

26. Other Liabilities \$/£

Details

27. Mortgage on Real Estate: Total Owed \$/£

B. Total Liabilities \$/£

Figure should be the total of line items 20 - 27

## NET WORTH

Total Assets (A) \$/£

Total Liabilities (B) (MINUS) - \$/£

Your Net Worth (EQUALS) = \$/£

## ACCOUNTANT VERIFICATION

I hereby confirm that the information recorded above accurately reflects the financial paperwork of the applicant.

Name (please print)

Accounting Firm

Address

Phone Number

Signature

Date

Primary Applicant Signature

Date

Secondary Applicant Signature (if applicable)

Date

Applicant(s) signature required to process application.