

NNY Modified Financial Form  
(10/11)

Last Name	First Name	PACTS Number

NOTE: I=Individual J=Joint S=Spouse/Significant Other D=Dependent

**ASSETS**

**BANK ACCOUNTS** (Include all personal and business checking and savings accounts, credit unions, money markets, certificates of deposit, IRA and KEOGH accounts, Thrift Savings, 401K, etc.)

I/J S/D	Name of Institution	Type of Account	Balance

**MOTOR VEHICLES**

I/J S/D	Year, Make, Model	Amount Owed	Fair Market Value

**REAL ESTATE**

I/J S/D	Real Estate Address	Mortgage Balance	Fair Market Value

**OTHER ASSETS** (Include any cash on hand, jewelry, art, paintings, collections, antiques, etc)

I/J S/D	Description	Fair Market Value

Do you anticipate an increase in the value of any assets?    Y    N    If yes, please explain below:

Did you file income taxes last year?    Y    N    Did you receive a refund?    Y    N

If yes, in what amount? \_\_\_\_\_

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**LIABILITIES**

CHARGE ACCOUNTS and LINES OF CREDIT (Include all bank credit cards, lines of credit, revolving charge accounts, etc.)

I/J S/D	Bank/Vendor Name	Amount Owed

OTHER DEBTS (do not include mortgage or motor vehicle debt if you do not own the property or vehicle; e.g. medical bills, delinquent taxes, child support, telephone, utilities, school loans)

I/J S/D	Owed To	Amount Owed