

SDAMAN

APPENDIX F

COMMANDING OFFICER'S FINANCIAL WORKSHEET

Disclosure of information on this format is voluntary. Possible adverse affects of nondisclosure could result in a decision being made to assign the subject to a special duty or independent duty assignment without consideration of information which, if known, might have had a bearing on that decision. The information solicited by this format is not to be included in any official system of records.

Rank _____ Last Name, First Name, MI _____ SSN/MOS _____
Unit _____ MCC _____

1. GENERAL INFORMATION

Married _____ Number of Children/dependants _____
(excluding spouse)

2. MONTHLY INCOME (Note 1)

a. Base Pay\$ _____
b. PRO/SEP Rations.....+ _____
c. SDA Pay - D.I. 275.00 RCTR 375.00.....+ _____
MSG 110.00
d. Other Income+ _____
e. Total Monthly Income\$ _____

3. MANDATORY MONTHLY DEDUCTIONS (Note 2)

a. FITW (Federal Tax)\$ _____
b. Social Security+ _____
c. Medicare+ _____
d. SITW (State Tax)+ _____
e. SGLI+ _____
f. Dental Family+ _____
g. Charity (Note 3).....+ _____

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- h. Allotments: _____ + _____
(Note 4) _____ + _____
 - i. Advance Pay+ _____
(Balance: \$ _____)
 - j. Child Support/Alimony+ _____
 - k. Other+ _____
(Explain: _____)
 - l. Total Mandatory Monthly Deductions\$ _____
4. MONTHLY CREDIT PAYMENTS/RECURRING BILLS & OBLIGATED DEBTS
(Note 5)
- a. Car #1.....\$ _____
 - b. Car #2.....+ _____
 - c. Car Insurance+ _____
 - d. Personal Life Insurance+ _____
 - e. Credit Cards: _____ + _____
_____ + _____
_____ + _____
_____ + _____
_____ + _____
_____ + _____
_____ + _____
 - f. Loans: _____ + _____
_____ + _____
_____ + _____
 - g. Other: _____ + _____
_____ + _____
 - h. Total Monthly Credit Payments..... \$ _____

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5. NET AVAILABLE FUNDS

- a. Total Monthly Income..... \$ _____.
- b. Total Mandatory Monthly Deductions..... + _____.
- c. Total Monthly Credit Payments..... + _____.
- d. NET AVAILABLE FUNDS..... \$ _____.

6. ADDITIONAL INFORMATION (Note 6)

- a. Savings Account(s): _____ \$ _____.
- b. Checking Account(s): _____ + _____.
- c. Investments: _____ + _____.
- d. Total Amount Available \$ _____.
- e. Spouse Income..... \$ _____.
This income contributes to credit
payments (Transferable Skill?) _____
- f. Do you own a home or mobile home? _____ yes/no
When Purchased? _____
- g. If yes, monthly payment:..... \$ _____.
(Mortgage Balance: \$ _____)

NOTE 1: Do not include BAH in computing monthly income.
BAH payments are considered to adequately cover housing
expenses.

NOTE 2: Normally those deductions found on the LES

NOTE 3: NRS, CFC, USN/MC Retirement Home, etc.

NOTE 4: Explain the type of allotment. Do not include
dependent allotments. (i.e. child's savings bonds, etc.)

NOTE 5: Do not include those creditors that are paid by
an allotment listed under MANDATORY MONTHLY
DEDUCTIONS. Do not include rent, mortgage,
utilities, telephone, etc. Do include recurring
bills paid by spouse.

NOTE 6: The items listed under ADDITIONAL INFORMATION are
intended to provide amplification of your financial
status. (Include mutual funds, IRA, etc., under savings
investments.)

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Signature of Marine

Date

Based upon my assessment, I find this Marine financially Qualified/Unqualified. The finding of UNQUALIFIED is amplified in the remarks below.

Signature of Commanding Officer _____

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