

# ENLISTEE FINANCIAL STATEMENT

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**PLEASE DO NOT RETURN YOUR ENLISTEE FINANCIAL STATEMENT TO THE ABOVE ADDRESS.**

## PRIVACY ACT STATEMENT

**Authority.** Title 5, USC, Section 301 establishes Departmental regulations. Title 10, USC, Section 503 provides information on enlistment, Section 504 provides information on persons not qualified for enlistment in the armed forces, Section 508 establishes reenlistment qualifications and Section 12103 establishes Reserve components qualifications. and E.O. 9397 (SSN). SORN ID# N01130-1

**Purposes.** To provide recruiters with information concerning personal financial status and other individualized items which may influence the decision to select or not select an individual for enlistment in the U.S. Navy. To provide historical data for comparison of financial status of current applicants with those selected in the past. To provide delayed entry personnel with training modules and allow DON officials to use the Navy Applicant Management Information System (NAMIS) to conduct surveys and administer on-line screening tools that identify whether the delayed entry personnel qualify for special operations programs and other high-priority programs.

**Routine Uses.** This information will be accessed by recruiters and DON officials with a need to know in support of requests for enlistment in the U.S. Navy. Information may also be released to officials and employees of other departments and agencies of the Executive Branch of government, upon request, in the performance of their official duties related to the management of quality military recruitment and the recruitment of Merchant Marine personnel.

The DoD 'Blanket Routine Uses' that appear at the beginning of the Navy's compilation of system of records notices also apply to this system.

**Disclosure.** Voluntary. However, failure to provide the requested information may result in an inability to process you for enlistment.

I affirm that I have read, understand, and agree to the above Privacy Act Statement.

\_\_\_\_\_  
**Signature of Applicant**

\_\_\_\_\_  
**Date**

**This financial statement is used only by authorized U.S. Navy personnel and shall be completed by all applicants with dependents enlisting or reenlisting in the Regular Navy/Navy Reserve, or when required by instruction.**

**Applicants in DEP over 90 days are required to complete an updated financial statement prior to shipping to RTC Applicants who acquire dependents while in DEP shall complete this financial statement prior to shipping to RTC. The signature of the spouse is mandatory unless the spouse resides outside the local recruiting area.**

1. Applicant Name (Last, First, MI)	2. Date of Birth	3. Eligible Pay Grade	4. Date
5. Applicant's Current Employer		5a. Employed Since	5b. Net Monthly Pay
6. Spouse's Current Employer		6a. Employed Since	6b. Net Monthly Pay
7. Other Applicant's/Family Sources of Income		7a. Employed Since	7b. Net Other Income
8. Total Family Net Income (5b+6b+7b)			

9. Estimated monthly income, prior to taxes and deductions, shall be calculated based on the current Defense Finance and Accounting Service (DFAS) Basic Pay Table found at [www.dfas.mil/militarypay/militarypaytables.html](http://www.dfas.mil/militarypay/militarypaytables.html).  
Total estimated Navy Pay (based on gross basic pay for enlistment pay grade)

9a. Est. Gross Base Pay \_\_\_\_\_

10. Number of Dependents \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_ AGE \_\_\_\_\_

11. Housing: Rent  Own  Buying  Other  Explain \_\_\_\_\_ 11a. Monthly Housing Cost: \_\_\_\_\_

12. Savings and Checking Assets:  
a. Do You Have a Savings Account Yes  No  Current Balance: \_\_\_\_\_  
b. Do You Have a Checking Account Yes  No  Current Balance: \_\_\_\_\_

13. Debt Payment History:  
a. Have you ever filed for bankruptcy? Yes  No  If yes, explain in block 16  
b. Have you ever been late on any payment more than 30 days? Yes  No  If yes, explain in block 16  
c. Do you have any liens or judgments pending against you? Yes  No  If yes, explain in block 16  
d. Do you have or ever had anything in collections? Yes  No  If yes, explain in block 16

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**14. Monthly Recurring Debt:**

<u>Category</u>	<u>Category</u>	<u>Amount Owed</u>	<u>Monthly Payment</u>
Mortgage	_____	_____	_____
Automobile Loan	_____	_____	_____
Credit Card (1)	_____	_____	_____
Credit Card (2)	_____	_____	_____
Credit Card (3)	_____	_____	_____
Credit Card (4)	_____	_____	_____
Bank Loan (1)	_____	_____	_____
Bank Loan (2)	_____	_____	_____
Child Support / Alimony	_____	_____	_____
Other Credit Debt	_____	_____	_____
<b>Totals</b>			<b>14a.</b> _____

**15. Monthly Living Expenses:**

<u>Expense Category</u>	<u>Monthly Expenditure</u>	<u>Remarks</u>
Food	_____	_____
Clothing	_____	_____
Utilities ( Gas, Water, Electricity, Etc.)	_____	_____
Insurance ( Life , Home, Auto, Health, Etc.)	_____	_____
Child Care	_____	_____
Phone	_____	_____
Cellular Service	_____	_____
Television, Cable, Satellite, DSL, Service	_____	_____
Entertainment	_____	_____
Miscellaneous Fee's for Services	_____	_____
Medical Care and Prescriptions	_____	_____
Other Expenses ( Explain in Remarks)	_____	_____
<b>Total from Block 14a</b>	_____	_____
<b>Total Monthly Living Expenses</b>	<b>15a.</b> _____	_____

16. Applicant's Remarks:  
(if additional space is required,  
continue on separate sheet of paper.)

**17. Financial Stability Calculations:**

Estimated Net Family Income (Add blocks 6b, 7b and 9a):	_____
Total Living Expenses 15a:	_____
Differential (+/-):	_____

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18. I certify that the information given in this statement is a true account of my financial obligations and that my dependents (line out as appropriate) Do  / Do Not  require any special medical attention/treatment.

\_\_\_\_\_  
**Signature of Applicant**

\_\_\_\_\_  
**Signature of Spouse**

\_\_\_\_\_  
**Authenticating Recruiter ( Type / Print)**

\_\_\_\_\_  
**Signature of Recruiter**

19. Command Representative Interview.

I have determined member is handling present personal and financial affairs in a mature, competent, and responsible manner; can meet current and expected financial obligations with service pay; and I have counseled the member concerning potential problems that may be experienced at the onset of enlistment relating to financial matters and the assignment to possible dependent restricted tours.

\_\_\_\_\_  
**Signature of Command Representative**

\_\_\_\_\_  
**Rank / Title of Position**

\_\_\_\_\_  
**Date**

20. Interviewers Comments / Recommendations

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