

Financial position:

ASSETS (what you own)

ASSET TYPE	ASSET DESCRIPTION*		CURRENT VALUE	OWNERSHIP		
				App1	App2	Both
Principal Home			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment Property	Weekly rent: \$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment Property	Weekly rent: \$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Contents			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motor Vehicle			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Motor Vehicle			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boats			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Savings Account			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cash / Term Deposits / Managed Funds			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shares			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Superannuation			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Superannuation			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other			\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Please include make, model and year for any vehicle and address for any property

TOTAL \$

LIABILITIES (what you owe)

LIABILITY - PROVIDER	LIMIT	BALANCE	INTEREST RATE	LOAN TYPE*	LOAN TERM REMAINING	MONTHLY REPAYMENT	TICK IF REFINANCING
Principal Home	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Investment Property	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Investment Property	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Motor Vehicle Finance	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Motor Vehicle Finance	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Personal Loan	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Credit Card	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Credit Card	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Other	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Other	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>
Other	\$	\$	%	<input type="checkbox"/> P&I <input type="checkbox"/> IO		\$	<input type="checkbox"/>

* Principal & Interest / Interest Only

TOTAL \$ \$

TOTAL MONTHLY \$