

Assets and Liabilities

Personal Details

Surname	Name	Surname	Name			
Current Address		Current Address				
State	P/Code	State	P/Code			
Move in date		Move in date				
Previous Address		Previous Address				
State	P/Code	State	P/Code			
Ph (H)	(W)	Ph (H)	(W)			
Mobile	DOB	Mobile	DOB			
Email		Email				
Occupation		Occupation				
Employer		Employer				
Salary P/A (Taxable)	Employment Status		Salary P/A (Taxable)	Employment Status		
	FT	PT	Csl	FT	PT	Csl
Length of Employment	Probation			Length of Employment	Probation	
	Yes	No			Yes	No
Company Car				Company Car		
Dependents	Ages			Dependents	Ages	
Self Employed						
Yes	No	Company Pty Ltd	Sole Trader	Business Proprietor	Partnership	
Annual Gross Turnover \$			Do you have last 2 yrs tax return?			
			Yes	No		

Assets	Value	Owner/Title	Rent
House (Personal)	\$		\$
Other Property 1	\$		\$
Other Property 2	\$		\$
Other Property 3	\$		\$
Superannuation	\$		
Shares	\$		
Managed Funds	\$		
Savings/Cash	\$		
Furniture	\$		
Other	\$		

Liabilities	Lender	Balance	Credit Limit	Mthly Payment
House (Personal)		\$	\$	\$
Other Property 1		\$	\$	\$
Other Property 2		\$	\$	\$
Other Property 3		\$	\$	\$
Personal Loans		\$	\$	\$
Credit Card		\$	\$	\$
Overdraft		\$	\$	\$
Other		\$	\$	\$

3 year employment				
Dates Started	Finished	Position	Employer	Contact Details

Motor vehicles		
Name	Year	Model

Living Expenses	Amount & Frequency	Continue after settlement	Comments (Where Applicable)	Broker Validation
Basic Housing & Property Expenses (Inc. Utilities)	\$	YES		YES
Rent / Board	\$	YES		YES

Living Expenses	Amount & Frequency	Continue after settlement	Comments (Where Applicable)	Broker Validation
Communications & Media	\$	YES		YES
Food, Groceries & Pets	\$	YES		YES
Recreation & Entertainment	\$	YES		YES
Clothing & Personal Care	\$	YES		YES
Medical & Health	\$	YES		YES
Transport	\$	YES		YES
Insurance	\$	YES		YES
Other	\$	YES		YES
New expenses after settlement not covered above	\$	YES		YES
Other likely changes to expenses	\$	YES		YES

Living Expenses	Amount & Frequency	Continue after settlement	Comments (Where Applicable)	Broker Validation
Education & Childcare	\$	YES		YES

Additional Notes

Documents Required

- 100 Pts ID
- 12 Months Bank, Credit Card & Loan Statements
- Last 2 yrs ATO Tax Summary
- Last 3 Pay Slips
- Rates Notice
- Personal, Home & Car Insurance Policies

Privacy Act

I / We authorise release of the information contained herein to such parties as are necessary to assess and provide advice regarding property investment provided that such information is treated as confidential and restricted to affiliated parties.

Signature _____

Signature _____

Consultants Name

Date / /