

Your Financial Snapshot



In order to make the most from our time together, please set aside some time to complete the following information prior to your first appointment. You will need to bring this information with you to that appointment. Please note: it is sufficient to round dollar amounts to the nearest thousand dollars.

Name/s Date

Address

Email Address

Mobile Phone (Home)

APPLICANT 1

Occupation Type

What was your gross income last year? \$ p.a. Other income \$

Date of birth / / Marital status

Number of children Age/s ABN How long?

APPLICANT 2

Occupation Type

What was your gross income last year? \$ p.a. Other income \$

Date of birth / / Marital status

Number of children Age/s ABN How long?

Please complete your current Assets and Liabilities as a combination of what both parties own.

	ASSETS <i>(what it's worth)</i>	LIABILITIES <i>(what's owing against it)</i>	LENDER / COMMENTS
Owner Occupied Home	\$ .....	\$ .....	.....
Investment Property 1	\$ .....	\$ .....	.....
Investment Property 2	\$ .....	\$ .....	.....
Investment Property 3	\$ .....	\$ .....	.....
Car 1: Type .....	\$ .....	\$ .....	.....
Car 2: Type .....	\$ .....	\$ .....	.....
Credit Card 1	Limit \$ .....	\$ .....	.....
Credit Card 2	Limit \$ .....	\$ .....	.....
Other Card	Limit \$ .....	\$ .....	.....
Personal Loans	Limit \$ .....	\$ .....	.....
Managed Investments	\$	\$
Savings	\$
Superannuation	\$
Personal Effects	\$
Shares	\$

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