



## Your estimated assets

|   | Suburb               | Value (\$)           | Monthly Investment Income* (\$) |
|---|----------------------|----------------------|---------------------------------|
| Existing property (home)  | <input type="text"/> | <input type="text"/> |                                 |
| Investment property 1   | <input type="text"/> | <input type="text"/> | <input type="text"/>            |
| Investment property 2   | <input type="text"/> | <input type="text"/> | <input type="text"/>            |
| Motor vehicle 1   |                      | <input type="text"/> |                                 |
| Motor vehicle 2   |                      | <input type="text"/> |                                 |
| Other assets e.g. furniture, personal effects, collectables, boat, etc. |                      | <input type="text"/> |                                 |
| Savings with (name of institution)                                      | <input type="text"/> | <input type="text"/> | <input type="text"/>            |
|   | <input type="text"/> | <input type="text"/> | <input type="text"/>            |
| Deposit already paid on new home or investment property                 |                      | <input type="text"/> |                                 |
| Investments:  | Superannuation       | <input type="text"/> | <input type="text"/>            |
|   | Shares               | <input type="text"/> | <input type="text"/>            |
| <b>TOTAL ESTIMATED ASSETS</b>   |                      | <input type="text"/> | <input type="text"/>            |

\*Monthly investment income includes rent and/or interest. How to convert to monthly amounts: Yearly income – divide by 12.  
 Weekly income – multiply by 52 then divide by 12. Fortnightly income – multiply by 26 then divide by 12.



## Your estimated liabilities

|   | Amount owing (\$)    | Facility limit/redraw (\$) | Monthly payment (\$) | Financier            |
|---|----------------------|----------------------------|----------------------|----------------------|
| Existing mortgage (home)                    | <input type="text"/> | <input type="text"/>       | <input type="text"/> |                      |
| Existing mortgage (investment property 1)   | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| Existing mortgage (investment property 2)   | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| Personal loans or hire purchase             | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| Car lease                                   | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| Other debts (store account/s, HECS, etc.)   | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| Contingent liability (e.g. guaranteed debt) | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| Current rent/ board paid (if applicable)    |                      |                            | <input type="text"/> |                      |
| Child care/maintenance                      |                      |                            | <input type="text"/> |                      |
| Credit card limits                          | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
|   | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
|   | <input type="text"/> | <input type="text"/>       | <input type="text"/> | <input type="text"/> |
| <b>TOTAL ESTIMATED LIABILITIES</b>          | <input type="text"/> | <input type="text"/>       | <input type="text"/> |                      |

This checklist is a guide only and not should not be relied upon as a comprehensive checklist.