

**Contact Details**

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Current as at:

Name:

**PERSONAL ASSET & LIABILITIES**

LIABILITIES VALUE

ASSETS VALUE

**LAND / REAL ESTATE MORTGAGE**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Residential Address** | **Estimate Value** |  | **Bank** | **Monthly Repayments** | **Mortgage Balance** |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Rent received per month (if applicable) | $ |  | Rent payment per month (if applicable) | $ |

**CREDIT CARDS**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Cash in Bank | $ |  | **Bank** | **Limit** | **Monthly Repayments** | **Balance** |
| Furniture & Fittings | $ |  |  | $ | $ | $ |
| Superannuation | $ |  |  | $ | $ | $ |
| Shares / Investments | $ |  |  | $ | $ | $ |

**OTHER ASSETS OTHER LIABILITIES**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Full Description of Asset (Vehicles, Caravan etc)** | **Value** |  | **Bank** | **Monthly Repayments** | **Balance** |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |
|  | $ |  |  | $ | $ |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TOTAL ASSETS** | $ |  | **TOTAL LIABILITIES** | $ |