

## Statement of financial position (financial application form)

Each client must complete a separate form

Client name: \_\_\_\_\_

### Monthly income

	Self	Spouse	Total
Wages and salaries	\$ _____	\$ _____	\$ _____
Investment income	\$ _____	\$ _____	\$ _____
Other income	\$ _____	\$ _____	\$ _____

### Monthly expenses

	Self	Spouse	Total
Rent/mortgage	\$ _____	\$ _____	\$ _____
Other loans/credit cards	\$ _____	\$ _____	\$ _____
Child support	\$ _____	\$ _____	\$ _____
Food	\$ _____	\$ _____	\$ _____
Utilities*	\$ _____	\$ _____	\$ _____
Rates and taxes	\$ _____	\$ _____	\$ _____
Clothing	\$ _____	\$ _____	\$ _____
Medical	\$ _____	\$ _____	\$ _____
Vehicle expenses	\$ _____	\$ _____	\$ _____
School/day care costs	\$ _____	\$ _____	\$ _____
Transport	\$ _____	\$ _____	\$ _____
Other expenses	\$ _____	\$ _____	\$ _____
<b>TOTALS</b>	\$ _____	\$ _____	\$ _____

\* Electricity, gas, water, phone, internet etc.

### Liabilities

	Self	Spouse	Total
Mortgage (total owed)	\$ _____	\$ _____	\$ _____
Credit card/s balance	\$ _____	\$ _____	\$ _____
Other loans balance	\$ _____	\$ _____	\$ _____
Taxes and fines owed	\$ _____	\$ _____	\$ _____
Other amounts owed	\$ _____	\$ _____	\$ _____
Other liabilities	\$ _____	\$ _____	\$ _____
<b>TOTALS</b>	\$ _____	\$ _____	\$ _____

**Assets**

**Important:** List **all** assets. If there is insufficient room below, list them on a separate sheet.

House/unit/apartment/investment property/other real estate (specify location and value):

_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____

Motor vehicles including cars, trucks, motorcycles (specify make, model, year, registration number and value):

_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____

Superannuation and shares (specify superannuation fund or company, and value):

_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____

Money in bank accounts (specify bank and amount):

_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____

Other assets including collectables (specify nature of the asset and value):

_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____
_____	Self: \$_____	Spouse: \$_____