



PERSONAL INFORMATION, ASSETS & LIABILITIES

MONTHLY BUDGET

Applicant 1:

Address:

Phone: _____ Mobile: _____ Email:

Date of Birth: _____ Income: _____ Commencement

Date: _____

Applicant 2:

Address:

Phone: _____ Mobile: _____ Email:

Date of Birth: _____ Income: _____ Commencement

Date: _____

ASSETS HOME/S - VALUE: _____

CAR/S etc -VALUE: _____ MODEL: _____ YEAR: _____

CAR/S etc -VALUE: _____ MODEL: _____ YEAR: _____

SUPER -Applicant 1 VALUE: _____ SUPER -Applicant 2
VALUE: _____

LIFE INSURANCE -Applicant 1 VALUE: _____ LIFE INSURANCE -Applicant 2
VALUE: _____

HOME CONTENTS etc
VALUE: _____

EXTRA NOTABLE ASSETS, etc VALUE: _____

General Living Expenses		Monthly Expense Estimate	Continue After Settlement	Explanation if required
Rent	- Rent			Ongoing or stopping after purchase
Basic Housing	- Electricity, gas, water rates, council rates - Furniture, Household Appliances, Household goods - Cleaning Expenses			
Communications	- Mobile, Home Phone, Foxtel & Internet			

Food, Groceries and Pets	- Food & Grocery costs			
Recreation & Entertainment	- Entertainment, Takeaway Food, Alcohol, Tobacco, Gambling and Childrens Activities.			
Clothing & Personal	- Personal and Family clothing, haircuts, magazines, sports, memberships			
Insurance and Health Costs	- Home, contents, Car, life & trauma, income protection, Private Health Fund			
Professional Costs	- Accountant, Legal, Tax Agent, Financial Planning			
Transport	- Registration, petrol, Licence, public transport, tolls, service & maintenance			
Educational & Childcare	- Childcare and school fees, Uniforms & expenses including travel fares			
Maintenance and Child Maintenance	- Maintenance and Child Maintenance			
Medical & Health	- Any amount you spend on medical & health expenses (pharmacy, dentist, doctors)			
Holidays and Gifts	- Holidays and Gifts			
<u>Other</u>	- Describe any expenses that are not described above (including extra Superannuation, Gym memberships etc)			
<u>Other</u>				
<u>New Expenses after purchase not covered above</u>	- Rates and property maintenance (FHO)			
<u>Other Likely changes to expenses</u>	- Describe:			

ANY OTHER INFORMATION YOU THINK THAT MAY BE IMPORTANT: _____

To the best of our ability we acknowledge that the above information provided is true and correct.

Applicant 1: NAME IN FULL _____ SIGNATURE: _____ DATE: _____

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