

YOUR EMPLOYMENT DETAILS:

	CLIENT 1:			CLIENT 2:		
Employment Status:	PAYG Employee	Self Employed	Family Business	PAYG Employee	Self Employed	Family Business
	Full Time	Part Time	Casual	Full Time	Part Time	Casual
	Contractor	Temporary	Home Duties	Contractor	Temporary	Home Duties
	Retired	Student	Not Employed	Retired	Student	Not Employed
	Govt. Benefit Recipient	Other		Govt. Benefit Recipient	Other	
Occupation:						
Employment sector or nature of business:						
Employer/Company name and address:						
Employer contact name and phone number (HR/Payroll contact):	Name: Ph:			Name: Ph:		
Employer email:						
Time at current employment:	Years		Months	Years		Months
Average hours per week (if casual or part time):						
<i>If employed or in business for less than 2 years, please provide previous employment details:</i>						
Previous occupation and industry (if different from current):						
Previous employment Status:						
	PAYG Employee	Self Employed	Family Business	PAYG Employee	Self Employed	Family Business
	Full Time	Part Time	Casual	Full Time	Part Time	Casual
	Contractor	Temporary	Home Duties	Contractor	Temporary	Home Duties
	Retired	Student	Not Employed	Retired	Student	Not Employed
	Govt. Benefit Recipient	Other		Govt. Benefit Recipient	Other	
Previous employers name and address:						
Time at previous employment:	Years		Months	Years		Months

YOUR FINANCIAL POSITION

The following information provides a snapshot of your net worth position

ASSET TYPE	VALUE	LIABILITY TYPE	LIMIT	MONTHLY REPAYMENT:	AMOUNT OWING:
Principle Home	\$	Principle Home Lender:	\$	\$	\$
Investment Property	\$	Investment Property Lender:	\$	\$	\$
Investment Property	\$	Investment Property Lender:	\$	\$	\$
Investment Property	\$	Investment Property Lender:	\$	\$	\$
Investment Property	\$	Investment Property Lender:	\$	\$	\$
Investment Property	\$	Investment Property Lender:	\$	\$	\$
Motor Vehicle Year/Make:	\$	Car Loan	\$	\$	\$
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Investments (e.g. shares, managed funds, term deposits)	\$	Credit Card 2	\$	\$	\$
Cash at Bank	\$	Credit Card 3	\$	\$	\$
Superannuation Client 1	\$	Credit Card 4/Store Card	\$	\$	\$
Superannuation Client 2	\$	Personal Loan Lender:	\$	\$	\$
Contents (insured value)	\$	Overdrafts and other bank facilities	\$	\$	\$
Other Assets (e.g. boats, caravans, collections)	\$	HECS liability/Taxation Debt	\$	\$	\$
Other – provide details	\$	Loans as guarantor Lender	\$	\$	\$
Other – provide details	\$	After Pay/Zip Pay	\$	\$	\$
TOTAL ASSETS (A)	\$	TOTAL LIABILITIES (B)	\$	\$	\$