

# Finance update form

## Return to:

Company Name:

Scan & email back to:

## Your details

First name:

Last name:

Contact number:

Email:

Postal address:

Suburb:

State:

Postcode:

Do you have dependants:  Yes  No

If yes, how many?

Age range

What has changed since we last spoke:

marriage

kids

new car

moved house

new job

What is your main financial goal?

Please tick if you are considering any of these in the next 12 months:

Fixing into a low interest rate

Refinancing or consolidating my debt/loans/both

Investing in property

other, please explain

## A quick look at your current financial situation

Your Income:

Employment status:

Your Partner's income:

Employment status:

Your current total liability:

Your current equity:

Loan type	Balance	Interest rate	Monthly payment	Asset value
Home Loan				
Investment loans				
Credit cards				
Store cards				
Car loans				
Personal loans				
Other				