

Statement of Financial Position

As at: / / (day/month/year)

Claim Number / Policy Number

1. PERSONAL DETAILS

Name

Address

Telephone

No. of Dependants

Age of Dependants
(if applicable)

Employer

Employment Status
(e.g full time, part time
or casual)

Occupation

Nominated Representative

If you would like to nominate a representative to handle your application on your behalf, include their details below:

2. INCOME DETAILS (PER MONTH)

Wages (after tax)

\$

Centrelink benefits (family allowance, Jobstart, or other)

\$

Rental income

\$

Child maintenance/support

\$

Other

\$

TOTAL

\$

3. EXPENSES (PER MONTH)

Rent and/or mortgage repayments	\$
Other loan payments	\$
Credit card payments	\$
Child support payments	\$
Motor vehicle expenses (petrol, insurance, lease payments, etc.)	\$
Living costs (food, public transport, telephone, etc.)	\$
Hospital/medical expenses	\$
TOTAL	\$

4. SUMMARY OF FINANCIAL POSITION: (Total Income less Total Expenses)

TOTAL Income	\$
TOTAL Expenses	\$
NET INCOME	\$

5. ASSETS

Real Estate	\$
Bank Accounts (Savings and Term Deposits)	\$
Motor Vehicles	\$
Boat / Motorbike / Caravan	\$
Furniture	\$
Computers	\$
Other	\$

6. REPAYMENTS

Amount you propose to pay (per month): _____ \$

Reason for financial difficulty – please tick

- | | | |
|---|---|--|
| <input type="checkbox"/> Carer responsibilities | <input type="checkbox"/> Over committed | <input type="checkbox"/> Workplace injury |
| <input type="checkbox"/> Unemployed | <input type="checkbox"/> Reduced income | <input type="checkbox"/> Other (<i>list</i>) |
| <input type="checkbox"/> Illness | <input type="checkbox"/> Reduced employment | _____ |
| <input type="checkbox"/> Relationship problems | <input type="checkbox"/> Relationship problems | |
| <input type="checkbox"/> Business/investment loss | <input type="checkbox"/> Business/investment loss | |

7. DISCLAIMER

I / We certify that this is a true and correct statement of my / our present financial position.

Name: _____ Name: _____

Date: / / Date: / /