PERSONAL STATEMENT OF FINANCIAL POSITION AT / / 20__

PERSONAL INFORMATION:

Full Name:	Date of Birth:
Occupation:	Business Ph: Home Ph:
Full Address:	

FINANCIAL INFORMATION:

LIABILITIES		
Overdraft (Name of Lender):	Limit $	Amount Owing $
Interest accrued	Due Date / /	$
Rates/Rents	Due Date / /	$
Mortgages/Secured Home Loans		
1.Name of Lender:	Repay Amount: $	$
Security provided/address:		
2.Name of Lender:	Repay Amount: $	$
Security provided/address:		
Unsecured Loans/Personal Loans		
1.Name of Lender:	Repay Amount: $	$
2.Name of Lender:	Repay Amount: $	$
Lease/Hire Purchase		
1.Name of Lender:	Repay Amount: $	$
Asset Purchased:		
2.Name of Lender:	Repay Amount: $	$
Asset Purchased:		
Credit/Store Cards (include even if balance is nil)		
Card Type Issuer	Card Limit $	$
	$	$
	$	$
TOTAL LIABILITIES		$
Contingent Liabilities (eg Personal guarantors)		

ASSETS		Owner's estimated market value $
Cash on Hand		
Accounts (Bank, Credit Union etc)		$
		$
		$
Share Portfolio: Stock	No. of Shares @ $	$
Stock	@ $	$
Real Estate: 1.Address		
Purchase Price $	Purchase Date / /	$
2.Address		
Purchase Price $	Purchase Date / /	$
3.Address		
Purchase Price $	Purchase Date / /	$
Motor Vehicles (Insurer:)		
Make & Model	Year of Manf	$
Make & Model	Year of Manf	$
Other Assets		$
		$
Life Policies (Insurer:)		
Sum Insured: $	Annual Prem $	Surrender Value $
$	$	$
TOTAL ASSETS		$
Superannuation (Est current payout) Fund Manager:		$
Furniture & Household Effects (Insurer:)		$

DECLARATION:

I, the undersigned, after enquiry declare as follows:

a) I am authorised to make this declaration.
b) I acknowledge the information provided on this proposal is true, factual and correct and authorise inquiries by . Insurance Limited for the purpose of approving this application.

Signed & Dated by Applicant / /20___

Signed & Dated by Joint Applicant / /20___