# Your Assets and Liabilities

## Your Assets

First Name | Surname | Date

Company Name or Entity | ACN

| | Suburb | Post code | Value ($) | Monthly Investment Income* ($) |
|---|---|---|---|---|
| Principal Residence: | | | | |
| Investment Property: | | | | |
| Investment Property: | | | | |
| Investment Property: | | | | |
| Investment Property: | | | | |
| Investment Property: | | | | |
| Investment Property: | | | | |
| Vacant Land: | | | | |
| Motor Vehicle: | | | | |
| Motor Vehicle: | | | | |
| Boat: | | | | |
| Equity in Business: | | | | |
| Term Deposit: | | | | |
| Motor Vehicle: | | | | |
| Motor Vehicle: | e.g. furniture, personal effects, collectables, etc.: | | | |
| Savings: | (name of institution) | | | |
| Savings: | | | | |
| Motor Vehicle: | already paid on new home or investment property | | | |
| Superannuation: | | | | |
| Superannuation: | | | | |
| Motor Vehicle: | | | | |
| | | **TOTAL ASSETS** | | |

*How to convert to monthly amounts: Yearly income – divide by 12. Weekly income – multiply by 52 then divide by 12. Fortnightly income – multiply by 26 then divide by 12.

# Assets and Liabilities

## Your liabilities

First Name | Surname | Date

Company Name or Entity | ACN

| | Amount owing ($) | Facility limit/redraw($) | Monthly payment ($) | Lender |
|---|---|---|---|---|
| Existing Home Loan: | | | | |
| Investment Loan: | | | | |
| Investment Loan: | | | | |
| Investment Loan: | | | | |
| Investment Loan: | | | | |
| Investment Loan: | | | | |
| Personal Loan: | | | | |
| Personal Loan: | | | | |
| Car Loan: | | | | |
| Car Lease: | | | | |
| Hire Purchase: | | | | |
| Rental | | | | |
| Rental | | | | |
| Other: | | | | |
| Credit Card Limits: | | | | |
| Credit Card Limits: | | | | |
| Credit Card Limits: | | | | |
| Credit Card Limits: | | | | |
| Current Rent | | | | |
| Child Care: | | | | |
| **TOTAL LIABILITIES $** | | | | |

Print Form