



STATEMENT OF FINANCIAL POSITION – INDIVIDUAL

Member no: _____

Name: _____

Address: _____

Home Contact: _____

Work Contact: _____

Mobile: _____

Email: _____

Income

1. My usual trade or occupation is:

2. I am employed by:
[if not employed write "not employed" OR if self employed write "self employed"]

3. My employer's address (or my place of business if self employed) is:

[if not employed write "not applicable"]

My employer's telephone number (or my work telephone number if self employed) is:

4. My fortnightly income after tax (from employment or self-employment) during the last fortnight has been *[if no income, write "nil"]*:

Fortnight ending	/	/	\$
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If applicable please attach a current payslip and / or Centrelink Statement for that fortnight.

5. The details of my other income (including government pensions, benefits and allowances, workers' compensation, superannuation, rent, board, interest, dividends), calculated fortnightly, are as follows *[if no other income, write "nil" below]*:

Nature of Income	\$ per fortnight
Government pension, benefit or allowance (please specify)	\$
Workers' compensation	\$
Superannuation received	\$
Rent or board received	\$
Interest on deposits/debentures	\$
Other income (please specify)	\$
TOTAL	\$

6. I receive maintenance of \$ per fortnight in respect of myself and my children.
[if no maintenance write "nil"]
7. I receive financial support or a financial contribution from family and others, calculated fortnightly, as follows *[if no financial support or contribution write "nil" below]:*

Name of person providing support	Nature of support	Value in \$ per fortnight
		\$
		\$
TOTAL		\$

Income of your dependants (if any)

[Generally, dependants are persons who rely on you for financial support]

8. I have dependants. *[write number of dependants or "nil" if no dependants]*
9. Their combined income, after tax, calculated fortnightly, is \$
[if no dependants write "nil"]

Property and Assets

["Property and assets" include land, houses, money in bank accounts and other investments, cars, boats, shares, moneys owed to you, interests in a deceased estate, interests in a trust.]

10. My property and assets are as follows *[if no assets write "nil" below]:*

House/Land <i>(including vacant land)</i> at:			
Market Value		\$	
Amount of Mortgage (if any)		\$	
Net Value			\$
Motor Vehicle: For each motor vehicle:-			
Year, Make and Model			
Market Value		\$	
Amount owed to finance company		\$	
Name of finance company:			
Net Value			\$
Deposit In Bank, Building Society, etc <i>(give details):</i>			
Bank/Society	Account Type	Amount	
		\$	
		\$	
Total			\$
Other Investments: including shares, debentures and bonds <i>(give details):</i>			
		\$	
		\$	
Total			\$

Money owing to you <i>(give details):</i>		
Name of debtor	\$	
Name of debtor	\$	
Total		\$
Value of interest in partnership or business <i>(give details):</i>		
	\$	
	\$	
Total		\$
Furniture, household and personal goods		
Total Estimated Market Value	\$	
Amount owing to Bank/Finance Company	\$	
Name of Bank/Finance Company:		
Net Value		\$
Life Insurance Policies <i>(give particulars and surrender value of each policy):</i>		
Maturity Date:		
	\$	
	\$	\$
Net Value		
Other Assets <i>(give particulars)</i>		
	\$	
	\$	
Total Value		\$
Total of Property and Assets		\$

Jointly owned assets

If any of the assets referred to above is owned jointly, identifying each asset and give the name of the other owner or owners	
Asset:	Name of other owner:

Expenses

11. My day-to-day living expenses (including living expenses of my dependants that are normally paid by me), calculated fortnightly, are as follows:

Nature of Expense	\$ per fortnight	Nature of Expense	\$ per fortnight
Rent / Board		Gas/electricity	
Mortgage repayments		Telephone	
Other loan repayments		Health care	
Council / Water rates		Child care	
Insurance premiums		Education	
Food		Other:	
Clothing		Other:	
Spouse/Child maintenance		Other:	
Travel and motor vehicle		TOTAL	\$

Liabilities

*["Liabilities" include outstanding mortgages, credit card debts, other moneys owed by you]
[if no liabilities write "nil" below]*

12. My liabilities are as follows:

Loans and other debts

Description of liabilities	Actual/estimated amount owing
Mortgage with	\$
Loan with	\$
Other (<i>give details</i>)	\$
TOTAL	\$

Credit card

Credit card with (<i>give details</i>)	Credit card limit	Actual/estimated amount owing
	\$	\$
	\$	\$
	\$	\$
TOTAL OWING		\$

Joint liabilities and debts

If any debts referred to above are due jointly, identifying each debt and give the name of the debtor or debtors:	
Description of liabilities	Name of other debtor:

Comments:

Offer To Pay:

Amount:

Frequency:

Commencing:

Signed:

Dated:

Witnessed:

I / We agree that the information collected by New England Credit Union Ltd will not be divulged to a third party.

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