

Your Financial Snapshot

In order to make the most from our time together, please set aside some time to complete the following information prior to your first appointment. You will need to bring this information with you to that appointment. Please note: it is sufficient to round dollar amounts to the nearest thousand dollars.



Name/s Date

Address

Email Address

Mobile Phone (Home)

APPLICANT 1	
Occupation	Type
What was your gross income last year? \$..... p.a.	Other income \$.....
Date of birth /..... /.....	Marital status.....
Number of children..... Age/s.....	ABN..... How long?.....
APPLICANT 2	
Occupation	Type
What was your gross income last year? \$..... p.a.	Other income \$.....
Date of birth /..... /.....	Marital status.....
Number of children..... Age/s.....	ABN..... How long?.....

Please complete your current Assets and Liabilities as a combination of what both parties own.

	ASSETS <i>(what it's worth)</i>	LIABILITIES <i>(what's owing against it)</i>	LENDER / COMMENTS
Owner Occupied Home	\$ .....	\$ .....	.....
Investment Property 1	\$ .....	\$ .....	.....
Investment Property 2	\$ .....	\$ .....	.....
Investment Property 3	\$ .....	\$ .....	.....
Car 1: Type .....	\$ .....	\$ .....	.....
Car 2: Type .....	\$ .....	\$ .....	.....
Credit Card 1	Limit \$ .....	\$ .....	.....
Credit Card 2	Limit \$ .....	\$ .....	.....
Other Card	Limit \$ .....	\$ .....	.....
Personal Loans	Limit \$ .....	\$ .....	.....
Managed Investments	\$ .....	\$ .....	.....
Savings	\$ .....		.....
Superannuation	\$ .....		.....
Personal Effects	\$ .....		.....
Shares	\$ .....		.....

Damien Peverill Mobile 0425 742 199
Email damien@1sport.com.au

Mark Roberts Mobile 0418 521 446
Email mark@1sport.com.au

MELBOURNE
Level 2, 49 Wellington Street
St Kilda, Vic 3182
Telephone (03) 9529 6344
Facsimile (03) 8677 3302

GOLD COAST
Level 2, 21 Lake Street
Varsity Lakes, Qld 4227
Telephone (07) 5657 8780
Facsimile (07) 5677 0699

PERTH
Level 3, 47 Kishorn Road
Applecross, WA 6153
Telephone 1300 172 292
Facsimile (08) 6313 0663



POSTAL ADDRESS: PO Box 238, Bond University, Qld 4227