



## Financial Assessment

Please print, complete & email to [info@myhomeloanadvisoraustralia.com.au](mailto:info@myhomeloanadvisoraustralia.com.au)

Applicant Name: <input type="text"/>	Applicant 2 Name: <input type="text"/>
Address: <input type="text"/>	Address: <input type="text"/>
Mobile Phone: <input type="text"/>	Mobile Phone: <input type="text"/>
Email Address: <input type="text"/>	Email Address: <input type="text"/>
Date of Birth: <input type="text"/>	Date of Birth: <input type="text"/>
Occupation: <input type="text"/>	Occupation: <input type="text"/>
Employer: <input type="text"/>	Employer: <input type="text"/>
Length of Employment: <input type="text"/>	Length of Employment: <input type="text"/>
Salary Per Annum: <input type="text"/> (If self employed taxable income)	Salary Per Annum: <input type="text"/> (If self employed taxable income)
ABN: <input type="text"/>	ABN: <input type="text"/>
Number of dependants (Children): <input type="text"/>	Number of dependants (Children): <input type="text"/>



## Assets

Home (Rented or Owned): <input type="text"/>	Investment property 1: <input type="text"/>
Investment property 2: <input type="text"/>	Car 1: <input type="text"/>
Car 2: <input type="text"/>	Savings: <input type="text"/>
Other Assets: <input type="text"/>	



## Liabilities

Credit Card 1 Limit: <input type="text"/>	Credit 1 Monthly Payment: <input type="text"/>
Credit Card 2 Limit: <input type="text"/>	Credit 2 Monthly Payment: <input type="text"/>
Credit Card 3 Limit: <input type="text"/>	Credit 3 Monthly Payment: <input type="text"/>
Credit Card 4 Limit: <input type="text"/>	Credit 4 Monthly Payment: <input type="text"/>
Car Loan 1 Value of Car: <input type="text"/>	Car Loan 1 Monthly Payment: <input type="text"/>
Car Loan 2 Value of Car: <input type="text"/>	Car Loan 2 Monthly Payment: <input type="text"/>
Personal Loan 1: <input type="text"/>	Personal Loan 1 Monthly Payment: <input type="text"/>
Personal Loan 1: <input type="text"/>	Personal Loan 1 Monthly Payment: <input type="text"/>
Rent: <input type="text"/>	Rent Weekly Payment: <input type="text"/>

## Other Liabilities

Other Liabilities: <input type="text"/>
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## What information do I need to give to a finance advisor to them get me my home loan?

Please see below:

- Employment status:
  - PAYG employed:  
2 recent pay slips & Last year Group Certificate.
  - Self-employed:  
Provide 2 years individual tax return / Company and/or Trust tax return / Company and/or Trust profit & Loss statement & Balance sheet.
- Existing Liability position:  
Any car loans/Personal loans/Home loans? (If applicable)
  - How much is Monthly Repayment?
  - How much is the outstanding loan balance?
- Any Credit cards?
  - Total credit limit.
- Deposit:
  - minimum 8%
- Married or single?
- How many Kids?

Any questions please contact us on 07 4448 7096 or go to our home loan advisor website at

[www.myhomeloanadvisoraustralia.com.au](http://www.myhomeloanadvisoraustralia.com.au)