

Statement of Financial Position

Any information contained in this statement is confidential. If you intend to complete the form using a mobile device, please ensure you save the file first, before opening and inputting your details.

Customer Details

Case Number:	Case Reference Number:
Given name(s):	Surname:
Residential Address:	
Marital Status:	Number of Dependents:
Age of Dependents:	
Employer:	Occupation:
Employment Status: Employed Unemployed Retired	Length of Employment:

Reason for Financial Difficulty:

Business/Investment Loss	Natural disaster	Reduced Employment
Carer Responsibilities	Over Committed	Relationship Problems
End of Interest Only Term	Prison	Unemployed
Illness	Reduced Income	Workplace Injury
Injury	Other (Specify Below)	
How long have you been in financial difficulty?:		
How much time do you need to overcome the financial difficulty?:		

Income Monthly:

Net Income Base:	\$	Overtime:	\$
Centrelink (before any deductions):	\$	Other Income:	\$
Family Tax Benefit:	\$	Estimated Dividend/Distribution:	\$
Child Support:	\$	Interest from Savings:	\$
Rental Income or Board:	\$	Investments:	\$
Total Monthly Income: \$			

Expenses Monthly:

Rent/Mortgage:	\$	Food/Groceries (Including Takeaway):	\$
Rates/Body Corporate Fees:	\$	Health (Insurance/Medical etc):	\$
Home/Contents Insurance:	\$	Entertainment:	\$
Utilities (Electricity/Gas/Water):	\$	Personal Care:	\$
Phone/Internet/Pay TV:	\$	Personal Insurance (eg Life Insurance):	\$
Repairs/Maintenance:	\$	Children Education/Childcare:	\$
Vehicle (Fuel/Insurance/Registration):	\$	Child Support Payment:	\$
Public Transport:	\$	Pets:	\$
Clothing:	\$	Other (Please Specify):	\$
Total Monthly Expenses: \$			

Assets:

Primary Home Residence:	\$	Personal Items:	\$
Investment Property/s:	\$	Savings:	\$
Vehicle/s:	\$	Investments:	\$
Home Contents:	\$	Other (specify):	\$
Total Assets: \$			

Liabilities Monthly:

Type of Debt	Owed To	Balance	Repayments
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
Total Liabilities:		\$	\$

Financial Summary:

Cash Flow		Net Position	
(+) Income	\$	(+) Assets	\$
(-) Expenses	\$	(-) Liabilities	\$
(-) Liabilities	\$		
(=) Available Funds	\$	(=) Net Position	\$
Date completed:			