

## Assets and Liabilities Checklist

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Your Estimated Assets	Suburb	Value	Monthly Investment Income
Existing Property Address		\$	
Investment Property 1		\$	\$
Investment Property 2		\$	\$
Motor Vehicle 1		\$	
Motor Vehicle 2		\$	
Other Assets eg, furniture, personal effects, collectables, boat, etc		\$	
Savings with Bank	Name:	\$	\$
	Name:	\$	\$
Deposit already paid on new home or investment property		\$	
Investments:	Superannuation	\$	\$
	Shares	\$	\$
<b>TOTAL ESTIMATED ASSETS</b>		\$	\$
* How to convert to gross monthly amounts (before tax): <b>Yearly</b> – divide by 12 to get gross monthly income <b>Weekly</b> – multiply by 52 then divide by 12 to get gross monthly income <b>Fortnightly</b> – multiply by 26 then divide by 12 to get gross monthly income			

Your Estimated Liabilities	Amount Owning	Facility limit/ Redraw	Monthly Payment	Financier
Existing Mortgage (home)	\$	\$	\$	
Existing Mortgage (Investment 1)	\$	\$	\$	
Existing Mortgage (Investment 2)	\$	\$	\$	
Personal loans or hire purchase	\$	\$	\$	
Car Lease	\$	\$	\$	
Other Debts	\$	\$	\$	
Current Rent / Board paid			\$	
Child Care / Maintenance			\$	
Credit Card Limits	\$	\$	\$	
<b>TOTAL ESTIMATED LIABILITIES</b>	\$	\$	\$	
* How to convert to gross monthly amounts (before tax): <b>Yearly</b> – divide by 12 to get gross monthly income <b>Weekly</b> – multiply by 52 then divide by 12 to get gross monthly income <b>Fortnightly</b> – multiply by 26 then divide by 12 to get gross monthly income				