

Assets and liabilities checklist



Estimated assets			
	Suburb	Value (\$)	Monthly investment income* (\$)
Existing property (home)	<input type="text"/>	<input type="text"/>	
Investment property 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment property 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Motor vehicle 1		<input type="text"/>	
Motor vehicle 2		<input type="text"/>	
Other assets e.g. furniture, personal effects, collectables, boat, etc.		<input type="text"/>	
Savings with (name of institution)	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Deposit already paid on new home or investment property		<input type="text"/>	
Investments	Superannuation	<input type="text"/>	<input type="text"/>
	Shares	<input type="text"/>	<input type="text"/>
Total estimated assets		<input type="text"/>	<input type="text"/>

* Monthly investment income includes rent and/or interest.

How to convert to monthly amounts:

Yearly income - divide by 12.

Weekly income - multiply by 52 then divide by 12.

Fortnightly income - multiply by 26 then divide by 12.

This checklist is a guide only and should not be relied upon as a comprehensive checklist

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Estimated liabilities

	Amount Owing (\$)	Facility limit/redraw (\$)	Monthly payment (\$)	Financier
Existing property (Home)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Existing mortgage (Investment property 1)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Existing mortgage (Investment property 2)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal Loans or hire purchase	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Car lease	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other debts (store accounts, HECS, etc.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contingent liability (e.g. guaranteed debt)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Current rent/ board paid (if applicable)			<input type="text"/>	
Child care/maintenance			<input type="text"/>	
Credit card limits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total estimated liabilities	<input type="text"/>	<input type="text"/>	<input type="text"/>	

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