



Personal Money Plan

Section 1

1. Applicant 1 - First Name Surname
 Applicant 2 - First Name Surname

2. Residential address (PO Box is not acceptable)

 State Postcode

3. Home Phone No Work Phone No Mobile Phone No

4. Account or card number Number of dependants

5. Employer 1 Length of employment years
 Employer 2 Length of employment years

WEEKLY INCOME		Amount			Amount
Weekly Salary/Wages (after tax)	\$		Spouse's Income (give details)	\$	
Regular Overtime	\$		Investment Income	\$	
Pension	\$		Other Income (give details)	\$	
Family Allowance	\$				
TOTAL AMOUNT				\$	

WEEKLY EXPENSES		Amount
Estimated Living Expenses		\$
House Mortgage Repayments (if house not owned, Rental/Board)		\$
Personal Loan Repayments		\$
Credit Cards	Card Type	\$
	Card Type	\$
	Card Type	\$
Other Debt Payments (give details)		\$
TOTAL AMOUNT		\$

Section 2

LIABILITIES		Amount
House Mortgage	To:	\$
Car Loan	To:	\$
Store Accounts (give details)	To:	\$
Personal Loan	To:	\$
Mastercard / Visa / AMEX	No.	\$
	No.	\$
	No.	\$
Other Liabilities (give details)	To:	\$
TOTAL AMOUNT		\$

ASSETS		Amount
House Property	At:	\$
Household Furniture		\$
Car (model & year)		\$
Other Bank Accounts		\$
Other Assets (give details)		\$
TOTAL AMOUNT		\$