



Date

Personal Money Plan

Section 1

Given name (Applicant 1)

Surname (Applicant 1)

Given name (Applicant 2)

Surname (Applicant 2)

Residential address (PO Box is not acceptable)

 State Postcode

Home phone number

Work phone number

Mobile phone number

Account number/Card number

No. of dependants

Employer (Applicant 1)	Employment type	Employer (Applicant 2)	Employment type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 2

View Income & Expense Totals by selected frequencies (W,F,M,Q or A)

Income	Freq	Amount		Freq	Amount
Salary/Wages (after tax)		\$	Other Applicants – Income (after tax)		\$
Bonus /Tax Return		\$	Income from Savings/Investments		\$
Centrelink Benefits		\$	Other Income (details):		\$
Total Income					\$

Expenses	Freq	Amount		Freq	Amount
House Mortgage repayments (or Rent)		\$	Basic Living expenses		\$
Personal Loan repayments		\$	Utility – Home expenses		\$
Credit Cards	Type:	\$	Phone expenses		\$
	Type:	\$	Transport expense		\$
	Type:	\$	Insurance payments		\$
Other Debt repayments		\$	Discretionary expenses:		\$
Total Expenses					\$

Section 3

Liabilities		Amount
House Mortgage	To:	\$
Car Loan	To:	\$
Personal Loan	To:	\$
Store Accounts (give details)	To:	\$
Credit Card 1	No:	\$
Credit Card 2	No:	\$
Credit Card 3	No:	\$
Other Liabilities (give details)	To:	\$
Total Liabilities		\$

Assets		Amount
House Property	At:	\$
Household Furniture		\$
Car/Vehicle		\$
Bank Accounts		\$
Other Assets (give details)		\$
Total Assets		\$