

STATEMENT OF FINANCIAL POSITION

APPLICATION TYPE: ☐ SOLE TRADER ☐ COMPANY PTY LTD ☐ TRUST STRUCTURE ☐ PARTNERSHIP ☐ OTHER

I. PERSONAL DETAILS

TITLE ☐ MR ☐ MRS ☐ MS ☐ MISS	FIRST NAME 	MIDDLE NAME 	LAST NAME
DATE OF BIRTH 	GENDER ☐ MALE ☐ FEMALE ☐ UNSPECIFIED	EMAIL 	
STREET NAME AND NUMBER 		MOBILE NUMBER 	
SUBURB 	STATE 	POST CODE 	MARITAL STATUS
		HOUSING STATUS 	
EMPLOYMENT TYPE ☐ FULL-TIME ☐ PARTTIME ☐ SELF EMPLOYED ☐ RETIRED ☐ UNEMPLOYED		OCCUPATION 	
NO. OF DEPENDANTS IN HOUSEHOLD 	LIST THE AGE OF DEPENDANT OLDEST DEPENDANT		YOUNGEST DEPENDANT
WHAT YEAR DID YOU LODGE YOUR LAST PERSONAL TAX RETURN? 			

II. REASONS FOR FINANCIAL DIFFICULTY (if applicable)

☐ BUSINESS / INVESTMENT LOSS	☐ INJURY	☐ PRISON	☐ FAMILY BREAKDOWN	OTHER LIST
☐ CARER RESPONSIBILITIES	☐ NATURAL DISASTER	☐ REDUCED INCOME	☐ UNEMPLOYMENT	
☐ ILLNESS	☐ OVERCOMMITTED	☐ REDUCED EMPLOYMENT	☐ WORKPLACE INJURY	
HOW LONG HAVE YOU BEEN IN FINANCIAL DIFFICULTY? YEARS MONTHS		HOW MUCH TIME DO YOU FEEL YOU NEED TO OVERCOME THE FINANCIAL DIFFICULTY? YEARS MONTHS		

III. MONTHLY INCOME

AFTER TAX SALARY PER MONTH 	CENTRELINK PER MONTH
FAMILY TAX BENEFIT PER MONTH 	CHILD SUPPORT PER MONTH
RENTAL INCOME OR BOARD PER MONTH 	OTHER INCOME PER MONTH
TOTAL PER BORROWER PER MONTH 	TOTAL MONTHLY HOUSEHOLD INCOME

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IV. MONTHLY HOUSEHOLD EXPENSES

HOUSING EXPENSES

RENT - PER MONTH

MORTGAGE - PER MONTH

RATES AND BODY CORPORATE FEES - PER MONTH

HOME / CONTENTS INSURANCE - PER MONTH

UTILITIES - PER MONTH (electricity, gas, water)

COMMUNICATION - PER MONTH (phone, internet, pay TV)

REPAIRS AND MAINTENANCE - PER MONTH

OTHER HOUSING EXPENSES - PER MONTH

TRANSPORT EXPENSES

VEHICLE (e.g. fuel, insurance, registration) - PER MONTH

PUBLIC TRANSPORT - PER MONTH

OTHER - PER MONTH

TOTAL MONTHLY HOUSEHOLD EXPENSES

PERSONAL AND FAMILY EXPENSES

FOOD AND GROCERIES - PER MONTH (including takeaway)

CLOTHING - PER MONTH

HEALTH - PER MONTH (eg Insurance, medical)

ENTERTAINMENT - PER MONTH

PERSONAL CARE - PER MONTH

PERSONAL INSURANCE - PER MONTH (eg life)

PETS - PER MONTH

OTHER - PER MONTH (eg subscriptions, sport, hobbies)

EDUCATION AND CHILDREN

CHILDREN EDUCATION/CHILDCARE - PER MONTH

SELF-EDUCATION - PER MONTH

OTHER (eg Child Support payment) - PER MONTH

V. ASSETS (where applicable)

ASSETS (CAR, SUPERANNUATIONS, SHARES, TOOLS, ETC) 1

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 2

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 3

DETAILS

OWNED BY

ESTIMATED VALUE

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V. ASSETS (where applicable)

ASSETS 4

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 5

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 6

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 7

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 8

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 9

DETAILS

OWNED BY

ESTIMATED VALUE

ASSETS 10

DETAILS

OWNED BY

ESTIMATED VALUE

TOTAL ASSETS

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VI. DEBTS**TYPE OF DEBT 1**

ACCOUNT NO.

CREDIT PROVIDER

OUTSOURCED DEBT COLLECTOR

SECURITY DETAILS

MONTHLY REPAYMENTS

\$ BALANCE OWED

\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

TYPE OF DEBT 2

ACCOUNT NO.

CREDIT PROVIDER

OUTSOURCED DEBT COLLECTOR

SECURITY DETAILS

MONTHLY REPAYMENTS

\$ BALANCE OWED

\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

TYPE OF DEBT 3

ACCOUNT NO.

CREDIT PROVIDER

OUTSOURCED DEBT COLLECTOR

SECURITY DETAILS

MONTHLY REPAYMENTS

\$ BALANCE OWED

\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

TYPE OF DEBT 4

ACCOUNT NO.

CREDIT PROVIDER

OUTSOURCED DEBT COLLECTOR

SECURITY DETAILS

MONTHLY REPAYMENTS

\$ BALANCE OWED

\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

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VI. DEBTS

TYPE OF DEBT 5

ACCOUNT NO.	CREDIT PROVIDER	OUTSOURCED DEBT COLLECTOR
SECURITY DETAILS	MONTHLY REPAYMENTS	\$ BALANCE OWED
		\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

TYPE OF DEBT 6

ACCOUNT NO.	CREDIT PROVIDER	OUTSOURCED DEBT COLLECTOR
SECURITY DETAILS	MONTHLY REPAYMENTS	\$ BALANCE OWED
		\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

TYPE OF DEBT 7

ACCOUNT NO.	CREDIT PROVIDER	OUTSOURCED DEBT COLLECTOR
SECURITY DETAILS	MONTHLY REPAYMENTS	\$ BALANCE OWED
		\$EXISTING REPAYMENTS AMOUNT

PLEASE PROVIDE A PROPOSAL FOR THE DEBTS YOU ARE SEEKING TO SETTLE, EXAMPLES BELOW:

1. PROPOSED SETTLEMENT TERMS – OUTLINE THE TOTAL AMOUNT YOU ARE OFFERING TO SETTLE THE DEBT.
2. LUMP SUM OFFER – I CAN AFFORD TO OFFER A ONE-OFF PAYMENT OF \$_____.
3. PAYMENT PLAN OFFER – I CAN AFFORD TO PAY \$_____ EVERY [WEEK/FORTNIGHT/MONTH].
4. COMBINATION OFFER – I CAN AFFORD TO PAY A LUMP SUM OF \$_____ NOW, AND \$_____ EVERY [WEEK/FORTNIGHT/MONTH] THEREAFTER.

PROPOSAL

DO YOU HAVE ANY DEBTS OWNING TO THE ATO CENTERLINK OR ANY OTHER GOVERNMENT AGENCY?

☐ YES ☐ NO

IF YOU ANSWERED YES PLEASE SPECIFY DETAILS: ORGANISATION

AMOUNT OWED
(AS AT LAST BALANCE)

ARE YOUR WAGES/SALARY/ CONTRACTOR FEE PAID INTO THE SAME BANK WE ARE NEGOTIATING?

☐ YES ☐ NO

IF YOU ANSWERED YES, PLEASE SPECIFY DETAILS:

DO YOU HAVE ANY DIRECT DEBITS SET UP FOR REGULAR PAYMENTS

☐ YES ☐ NO

IF YES, TOTAL DIRECT DEBITS

TOTAL DEBT

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VII. SUMMARY OF FINANCIAL POSITION**TOTAL ASSET POSITION**

TOTAL ASSETS

TOTAL DEBTS

CASH FLOW POSITION

TOTAL INCOME

TOTAL LIVING EXPENSES

TOTAL MONTHLY INCOME BEFORE REPAYMENTS (Income less Living Expenses)

VIII. DATE OF FINANCIAL POSITION

DATE

Upon completion, please make sure that you save all changes and email this from to support@creditreboot.com.au