

STATEMENT OF FINANCIAL POSITION

A Your details

Applicant (1)

Mr Mrs Ms Miss Other (please specify)

First name(s) _____ Surname _____

Date of birth DAY / MONTH / YEAR _____ Occupation _____

Physical address _____ Phone _____

Postal address _____ Mobile _____

Email address _____ Fax _____

Applicant (2)

Mr Mrs Ms Miss Other (please specify)

First name(s) _____ Surname _____

Date of birth DAY / MONTH / YEAR _____ Occupation _____

List any existing accounts/credit card number you hold with WestpacTrust

B Assets and liabilities summary

Assets

Total land & buildings
(please provide details in section D) \$ _____

Total deposits
(please provide details in section E) \$ _____

Total shares or stocks
(please provide details in section E) \$ _____

Net investments in businesses
(please provide details in section E) \$ _____

Life insurance/superannuation

Total surrender value \$ _____

Vehicles/machinery/boats etc

_____ \$

_____ \$

_____ \$

_____ \$

Household contents/furniture

Total insured value \$ _____

Other assets

_____ \$

_____ \$

_____ \$

_____ \$

_____ \$

_____ \$

_____ \$

Total(a) \$ _____

WestpacTrust use only

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

\$ _____

(b) \$ _____

Liabilities

Overdraft(s) \$ _____

Total secured loans \$ _____
(please provide details in section D)

Other loans \$ _____

_____ \$

Hire purchase/leases \$ _____

Store/credit cards \$ limit \$ _____

\$ limit \$ _____

Other finance \$ limit \$ _____

\$ limit \$ _____

\$ limit \$ _____

Other debts \$ _____

_____ \$

_____ \$

Total(c) \$ _____

Contingent liabilities (guarantees etc)

_____ \$

_____ \$

_____ \$

_____ \$

_____ \$

Surplus (a-c) \$ _____

MES (b-c) \$ _____

C Income and expenditure

Monthly income

	Applicant (1) \$ gross	Applicant (2) \$ gross
Salary/wages	\$ _____	\$ _____
Drawings	\$ _____	\$ _____
Commissions	\$ _____	\$ _____
Rental	\$ _____	\$ _____
Investment income	\$ _____	\$ _____
Other income (specify)	\$ _____	\$ _____
	\$ _____	\$ _____
	\$ _____	\$ _____
	\$ _____	\$ _____
	\$ _____	\$ _____
	\$ _____	\$ _____
Subtotals	\$ _____	\$ _____

Monthly expenditure

Existing loan payments (specify Lender name & term until expiry)	Total monthly payments \$
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Hire purchase/leases	\$ _____
Store/credit cards	\$ _____
Life insurance	\$ _____
Rental	\$ _____
Childcare/maintenance	\$ _____
Rates and insurance	\$ _____
Other expenses	\$ _____
Total	\$ _____

D Property owned

Address or location of land or buildings	Name on the title of the land	Government valuation and date	Total mortgages owing on property (specify if 1st or 2nd mortgage & total term of debt)	Purchase price or registered valuation and date
State if residence is a joint family home		\$ _____	\$ _____	\$ _____

E Investments (deposits, shares, unit trusts, business interests etc)

Type of investment (Deposits, shares, unit trusts etc)	Name of company	Cost	Type of valuation (ie market, equity etc)	Current value
		\$ _____		\$ _____
		\$ _____		\$ _____
		\$ _____		\$ _____
		\$ _____		\$ _____
		\$ _____		\$ _____
		\$ _____		\$ _____

Declaration

With this statement, I/we certify, agree and acknowledge that:

- The information in it is true, correct and complete in every respect
- It has been made to help see if WestpacTrust will provide banking facilities to me/us. If any relevant information is withheld this application may be declined
- WestpacTrust has full authorisation to:
 - Make any enquiries about any statements made in this application
 - Disclose any personal information to any party
 - Seek any extra information it needs from any other party.
- We are bound by any current and future terms and conditions WestpacTrust may impose on the banking facilities provided to me/us
- Personal information is collected to assist WestpacTrust. WestpacTrust and its related companies are the recipients of this information and they will maintain and keep it secure. Subject to the provisions of the Privacy Act 1993, you have the right to access and correct this information

Applicant's signature _____ DATE DAY / MONTH / YEAR

Partner's signature _____ DATE DAY / MONTH / YEAR