

# PRELIMINARY FINANCE ASSESSMENT

## APPLICANT 1

Full Name	No. of children:	Date of Birth / /
Address	Home Phone:	
Email Address	Mobile:	
Current Occupation & Employer	Years Employed:	Work Phone:
Previous Employer (if current employment 2 years or less)	Years Employed:	Work Phone:

## APPLICANT 2

Full Name	No. of children:	Date of Birth / /
Address	Home Phone:	
Email Address	Mobile:	
Current Occupation & Employer	Years Employed:	Work Phone:
Previous Employer (if current employment 2 years or less)	Years Employed:	Work Phone:

### ASSETS

Item	Value
Home	\$
Inv. Property1	\$
Inv. Property2	\$
Inv. Property3	\$
Motor Vehicles	\$
Cash	\$
Deposits Paid	\$
Shares Held	\$
Home Contents	\$
Superannuation1	\$
Superannuation2	\$
<b>Total Assets</b>	\$
<b>Surplus</b>	\$

### CURRENT LIABILITIES

Item	Existing Financier	Min. Monthly Repayment	Amount Owing
Home Mortgage		\$	\$
Rent Received \$ pw		\$	\$
Rent Received \$ pw		\$	\$
Rent Received \$ pw		\$	\$
Lease/s		\$	\$
Weekly Rent paid		\$	N/A
Overdraft Limit		\$	\$
Credit Card 1 Limit:		\$	\$
Credit Card 2 Limit:		\$	\$
Credit Card 3 Limit:		\$	\$
Personal Loan		\$	\$
Child Maintenance		\$	N/A
<b>Total Liabilities</b>		\$	\$

### INCOME DETAILS

#### APPLICANT 1

#### APPLICANT 2

	APPLICANT 1	APPLICANT 2
Salary		
Other Income		
Rental Income		
Investments		
<b>Total Income</b>		

How much could you afford per week to put towards your Wealth Building Structure, without affecting your lifestyle?

\$

I/We authorise Capital Properties to arrange a Preliminary Finance Assessment through a suitable finance broker, at no cost to me/us, using details supplied on the Preliminary Finance Assessment form, and I/we confirm that details provided represent my/our income, assets, and liabilities which the result will be based.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_