**Personal Information - Assets**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Financial Position** | | | | |
| **Assets and Liabilities** | **Value** | **Balance/ Limit** | **Monthly Payment** | **Financier** |
|  |  |  |  |  |
| House |  |  |  |  |
|  |  |  |  |  |
| Investment Property/s |  |  |  |  |
|  |  |  |  |  |
| Vehicle/s |  |  |  |  |
|  |  |  |  |  |
| Household Contents |  |  |  |  |
|  |  |  |  |  |
| Investments |  |  |  |  |
|  |  |  |  |  |
| Savings |  |  |  |  |
|  |  |  |  |  |
| Personal Loan/s |  |  |  |  |
|  |  |  |  |  |
| Credit Card/s |  |  |  |  |
|  |  |  |  |  |
| Store Card/s |  |  |  |  |
|  |  |  |  |  |
| Superannuation (present value) |  |  |  |  |
|  |  |  |  |  |
| Other |  |  |  |  |
| Total |  |  |  |  |
| **Net Worth\*** |  | \*(Calculated as the total value of assets less the total of the balance/limit column) | | |