

# Life & Finance UPDATE FORM

## Return to:

Company Name:

Company Address:

Fax back to:

Email back to:

## Your details

First name:

Last name:

Contact number:

Email:

Postal address:

Suburb:

State:

Postcode:

Do you have dependants:  Yes  No

If yes, provide details:

What has changed since we last spoke?  
(marriage, kids, new car, moved house, new job etc)

What is your main financial goal?

How do you hope we can help?

Are you interested in any of the following:  Getting the 'best deal'  Switching  Credit card / debt consolidation  
 Topping up your loan  Investing  Check if your loan still suits you

## A quick look at your current financial situation

Your Income:

Employment status:

Your Partner's income:

Employment status:

Your current total liability:

Your current equity:

Loan type	Balance	Interest rate	Monthly payment	Asset value
Home Loan				
Investment loans				
Credit cards				
Store cards				
Car loans				
Personal loans				
Other				