



Personal Assets & Liabilities

Name – Individual 1:	
Name – Individual 2:	

CASH IN BANK/TERM DEPOSITS

Description	Owner(s)	Market Value	Financial Institution
		\$	
		\$	
		\$	

REAL ESTATE ASSETS

Property address	Owner(s)	Rental income	Estimated value
		\$	\$
		\$	\$
		\$	\$

OTHER ASSETS

Description eg shares, investments, motor vehicle	Owner(s)	Market value	Financial institution
		\$	
		\$	
		\$	

LIABILITIES

Name debts in	Financial institution	Loan type	Limit	Monthly payments	Rate
			\$	\$	%
			\$	\$	%
			\$	\$	%
			\$	\$	%

Name – Individual 1

Signature

Date

Name – Individual 2

Signature

Date