

Statement of Financial Position



Personal Details of Applicant	
Title:	Surname:
Given Names:	
Date of Birth:	
Country of Birth:	
NZ Residency Held:	YES / NO
Relationship Status:	
Number of Dependents:	
Age of Dependents:	
NZ IRD Number:	
Current Address and Contact Details	
Current Accommodation Type: <i>(Please Delete)</i>	
Own Home / Renting / Boarding	
Residential Address:	
Mobile Phone Number:	
Email Address:	
Previous Address <i>(if current less than 3 years)</i>	
Employment Details	
Occupation:	
Employer:	
Type of Employment:	
Time at Current Employer:	
Previous Employment – <i>if less than 3 years</i>	

Personal Details of Joint Applicant	
Title:	Surname:
Given Names:	
Date of Birth:	
Country of Birth:	
NZ Residency Held:	YES / NO
Relationship Status:	
Number of Dependents:	
Age of Dependents:	
NZ IRD Number:	
Current Address and Contact Details	
Current Accommodation Type: <i>(Please Delete)</i>	
Own Home / Renting / Boarding	
Residential Address:	
Mobile Phone Number:	
Email Address:	
Previous Address <i>(if current less than 3 years)</i>	
Employment Details	
Occupation:	
Employer:	
Type of Employment:	
Time at Current Employer:	
Previous Employment – <i>if less than 3 years</i>	

Statement of Financial Position



TRUSTS AND ENTITIES	
Name of Trust:	Name of Company:
Name of all Trustees:	Name of all Directors:
Name of all Beneficiaries:	Name of all Shareholders and Ownership %:
Trust IRD Number:	Company IRD Number:

Income and Expenses			
Income		Expenses	
Salary / Wage	Annual / Gross	Current Mortgages	Monthly Payment
Applicant 1:	\$	\$ @	\$
Applicant 2:	\$	\$ @	\$
Business	\$	\$ @	\$
Applicant 1:	\$	\$ @	\$
Applicant 2:	\$	\$ @	\$
Rental Income		Total Monthly Mortgage	
Property 1:	\$	w/m/a	\$
Property 2:	\$	w/m/a	\$
Property 3:	\$	w/m/a	\$
Property 4:	\$	w/m/a	\$
Property 5:	\$	w/m/a	\$
Other - Please State:		Credit Card	
	\$	Limit	\$
	\$	Balance	\$
		Personal Loans	
		Balance	\$
		Monthly	\$
		Expenses	
		(Transfer from next Page)	
		\$	
		Other Costs	
		\$	
		\$	
TOTAL		TOTAL	
		\$	

Statement of Financial Position



Household Expenses	
	Monthly Cost
Food	\$
Entertainment	\$
Alcohol & Nicotine	\$
Personal Care & Clothing	\$
Utilities	\$
Transport	\$
Household Expenses	\$
Insurance (Personal)	\$
Insurance (Property)	\$
Insurance (Vehicle)	\$
Insurance (Other)	\$
Rent to Pay	\$
Rates	\$
School & Education Cost	\$
Child Care/Day Care	\$
Body Corporate	\$
Ongoing Subscriptions	\$
Tithing/Regular Donations	\$
KiwiSaver	\$
TOTAL	\$

Statement of Financial Position



Assets and Liabilities			
Assets		Liabilities	
Main Bank:		Personal Loan	\$
Cash	\$	Credit Card	\$
Property			\$
Address:	\$	Mortgages:	
Address:	\$	Bank:	\$
Address:	\$	Bank:	\$
Address:	\$	Bank:	\$
Address:	\$	Bank:	\$
Business	\$	Bank:	\$
Kiwisaver	\$	Other:	
Vehicles	\$	Description:	\$
	\$		\$
Other	\$		\$
	\$		\$
	\$		\$
	\$		\$
"A" TOTAL	\$	"B" TOTAL	\$

Net Worth	
Assets (A)	\$
<i>Less</i>	
Liabilities (B)	\$
TOTAL	\$

Signature

Signature

Name and Date

Name and Date