

Life and finance update form



FAX BACK TO: 02 9891 4565 OR EMAIL BACK TO: info@cumberlandhomeloan.com.au OR POST TO: PO Box 239 Parramatta 2124 Ph. 1800 13 1937

Your details

First name _____ Last name _____

First name _____ Last name _____

Contact number _____ Email _____

Postal address _____

Suburb _____ State _____ Postcode _____

Do you have dependants yes/no
If yes, please provide details _____

What has changed since we last spoke? (marriage, children, new car, moved house, new job, thinking of an investment property 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 lending still suits you

Please feel free to attach further notes or other documents as required.

A quick look at your current financial situation

Income \$ _____ Employment status: Full time/part time/casual/self employed

Your Partner's income \$ _____ Full time/part time/casual/self employed

Your current debts

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