

Statement of Financial Position



Customer name:		Date of birth:	
Application number/ customer ID:			
Credit limit originally approved:		Credit limit requested:	
Reason for increased limit:			

What you own:

Home (value estimate/CV):	\$
Other residential property:	\$
Other commercial property:	\$
Cars & other vehicles - specify make/model/year:	
	\$
	\$
	\$
Cash & term deposits:	\$
Investments, shares & bonds:	\$
Net value of your business (if self employed):	\$
Household/personal goods:	\$

Total assets: \$

What you owe:

Mortgage on your home:	\$
Mortgage on other residences:	\$
Mortgage on commercial property:	\$
Car/vehicle loans:	\$
Finance contract loans (hire purchase):	\$
Other personal loans - supply details:	
	\$
	\$
	\$
Credit Cards - specify who with:	Limit Owing
	\$ \$
	\$ \$
	\$ \$
Total debts owing:	\$

If you are self-employed:

Accountant's name:			
Accountant's address:			
Phone number:		Email Address:	

Checklist

- Completed Statement of Financial Position Proof of Income

Acceptable proof of income

Employee	<p>Bank statement with minimum 1 month history and not older than 3 months OR IRD summary with 12 months earnings</p>
Self-Employed	<p>Company financials including annual turnover and annual salary OR Accountant letter including accountant's name, contact details, confirmation of annual salary, and annual turnover of the business OR IRD summary with 12 months earnings</p>

I confirm that the above information is true and correct:

Signature: _____

Date: _____