

PERSONAL DETAILS (To be completed and sent to info@investmentrise.com.au)

APPLICANT 1			APPLICANT 2		
Full Name:			Full Name:		
Date of Birth:			Date of Birth:		
Marital Status:		No. of Dependents:	Age(s) of Dependent(s):		
Address:					
Residential Status:	Home Owned With or Without Mortgage <input type="checkbox"/>				
	Renting <input type="checkbox"/>	\$ per week	Boarding <input type="checkbox"/>	\$ per week	
Telephone: (H/W)		(M)	Telephone: (H/W)		(M)
Email:			Email:		
Occupation:			Occupation:		
Employment Status:	Salaried <input type="checkbox"/>	Self-Employed <input type="checkbox"/>	Employment Status:	Salaried <input type="checkbox"/>	Self-Employed <input type="checkbox"/>
Full Time <input type="checkbox"/>	Part Time <input type="checkbox"/>	Casual <input type="checkbox"/>	Full Time <input type="checkbox"/>	Part Time <input type="checkbox"/>	Casual <input type="checkbox"/>
Years at Current Employment:			Years at Current Employment:		
Annual Gross Salary: \$			Annual Gross Salary: \$		
Other Income per annum (Inc. Rent):			Other Income per annum (Inc. Rent):		

STATEMENT OF ASSETS & LIABILITIES

ASSETS	Value \$	LIABILITIES	INT RATE	VAR/FIXED	Monthly Payment	\$ Owing
1. Home/ Property at		1. Lender				
2. Property at		2. Lender				
3. Property at		3. Lender				
4. Car(s)		4. Lender				
5. Household Effects		5. Personal Loan from				
6. Shares		6. Other Loan				
7. Managed Funds		7. Credit Card Limit \$				
8. Other Investments		8. Credit Card Limit \$				
9. Savings		9. Credit Card Limit \$				
10. Superannuation		10. Overdraft Limit				
11. Other Asset		11. Other Debt				
TOTAL		TOTAL				
INCOME AFTER TAX PER MONTH						
LIVING EXPENSES PER MONTH						

Investment Rise is committed to ensuring the confidentiality and privacy of our Customer's personal information. In relation to managing personal information, Investment Rise abides by the National Privacy Principles contained in the Privacy Act. For the purpose of assisting you with an analysis we collect and record your personal information. We may distribute your personal information within our company and/or disclose it to other parties in connection with our normal business operations. However, we do not disclose any personal information for any other purposes without your consent. If we do, it will only be disclosed to someone else as required by law. If you do not provide us with your personal details, we may not be able to provide our services to you.