

# Statement of Financial Position



Complete this form if you are unable to meet your loan obligations and you require assistance from Gateway.  
Please email your completed form to [assist@gatewaybank.com.au](mailto:assist@gatewaybank.com.au).

**Important information: You will not be able to save partially completed forms.**

Gateway Bank Ltd  
ABN 47 087 650 093  
AFSL 238293

Australian Credit Licence Number 238293

\*Denotes mandatory field

## Step 1 - Your Membership Number (if applicable)

Member 1\*

Name\*

Member No.\*

Member 2\*

Name\*

Member No.\*

## Step 2 - Tell us about you

### Member 1

#### Personal Details\*

Borrower OR  Guarantor

Title\*  Mr  Mrs  Ms  Other

Full Name\*

Gender\*  Female  Male Date of Birth\*

### Member 2

#### Personal Details\*

Borrower OR  Guarantor

Title\*  Mr  Mrs  Ms  Other

Full Name\*

Gender\*  Female  Male Date of Birth\*

#### Residential Address\*

Current Residential Address

Time at this address\* YY  MM

#### Residential Address\*

Current Residential Address

Time at this address\* YY  MM

#### Contact Details\*

Home     
Country Area Number

Mobile     
Country Area Number

Work     
Country Area Number

Email

#### Contact Details\*

Home     
Country Area Number

Mobile     
Country Area Number

Work     
Country Area Number

Email



Step 2 - Tell us about you (continued)

**Additional Details\***

**Drivers Licence**    
 State / Number

**Marital Status\***  Single  Married  Defacto  
 Separated  Divorced  Widowed

**Additional Details\***

**Drivers Licence**    
 State / Number

**Marital Status\***  Single  Married  Defacto  
 Separated  Divorced  Widowed

**Current housing situation\***

Own home outright  Buying home / Mortgaged  
 Renting  Boarding  Living with family  
 Other

**Number of dependants\***

**Age of dependants**

**Current housing situation\***

Own home outright  Buying home / Mortgaged  
 Renting  Boarding  Living with family  
 Other

**Number of dependants\***

**Age of dependants**

Name and address of present Landlord/Agent/Mortgagee (if applicable)

Name and address of present Landlord/Agent/Mortgagee (if applicable)

Step 3 - Tell us about your work

**Member 1**

**Employment Details\***

Full Time  Part Time  Casual  
 Retired  Contract  Self Employed  
 Other

**Current Employment Details\***

Occupation\*

Name of current employer / business

Commencement date\*

**Member 2**

**Employment Details\***

Full Time  Part Time  Casual  
 Retired  Contract  Self Employed  
 Other

**Current Employment Details\***

Occupation\*

Name of current employer / business

Commencement date\*



Step 3 - Tell us about your work (continued)

**Current Employment Contact Details\***  
Address  
  
Phone  Country  Area  Number

**Current Employment Contact Details\***  
Address  
  
Phone  Country  Area  Number

**If self employed - Accountant Details**  
Accountant Name\*   
Accountant Address\*   
Phone  Country  Area  Number

**If self employed - Accountant Details**  
Accountant Name\*   
Accountant Address\*   
Phone  Country  Area  Number

**Previous Employer Address**  
  
Phone  Country  Area  Number

**Previous Employer Address**  
  
Phone  Country  Area  Number

Step 4 - Tell us about your Financial Position

If joint applicants are partners, you may combine assets, liabilities and expenses but base salary details must be specified separately.

Member 1 Name\*  Relationship to Member 1  
Member 2 Name\*



Step 4 - Tell us about your Financial Position (continued)

**Statement of Financial Position\***

<b>Assets*</b>	Description	Current Value
Home	<input type="text"/>	\$ <input type="text"/>
Other Property / Land	<input type="text"/>	\$ <input type="text"/>
Motor Vehicle(s)	<input type="text"/>	\$ <input type="text"/>
Savings	<input type="text"/>	\$ <input type="text"/>
Superannuation	<input type="text"/>	\$ <input type="text"/>
Home Contents	<input type="text"/>	\$ <input type="text"/>
Other	<input type="text"/>	\$ <input type="text"/>
<b>TOTAL ASSETS</b>		\$ <input type="text"/>

<b>Liabilities*</b>	Lender Name	Credit Limit(s)	Current Balance	Monthly Repayment	Have you sought assistance from these lenders?
Mortgage(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Other loan(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Overdraft(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Credit / Store Cards	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Hire Purchase / Lease(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
Other (e.g. SMSF loan, HECS)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
<b>TOTAL LIABILITIES</b>		<input type="text"/>	<input type="text"/>	<input type="text"/>	



Step 4 - Tell us about your Financial Position (continued)

Income*	Description	Gross per month	After Tax per month
Base Salary - Member 1	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Base Salary - Member 2	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Other Income <small>E.g. regular overtime, commissions, allowances, part time or casual work</small>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Rental Income <small>Do not show property outgoings as an expenditure item, as gross rental income is discounted</small>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Investments <small>E.g. interest or dividends</small>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Government benefits or pensions	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Other	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<b>TOTAL MONTHLY INCOME</b>		\$ <input type="text"/>	\$ <input type="text"/>

Expenditure*	Description	Average Monthly
Rent/ board	<input type="text"/> <small>Continue after new loan? <input type="checkbox"/> Y <input type="checkbox"/> N</small>	\$ <input type="text"/>
Childcare <small>Incl. nannies and compulsory pre-school</small>	<input type="text"/>	\$ <input type="text"/>
Child maintenance for non dependent children <small>Incl. child support.</small>	<input type="text"/>	\$ <input type="text"/>
Clothing and personal care <small>Incl. footwear, personal care products, cosmetics, hair services and accessories.</small>	<input type="text"/>	\$ <input type="text"/>
Education - higher and vocational training fees <small>Excluding HECS.</small>	<input type="text"/>	\$ <input type="text"/>
Education - independent and private <small>Incl. independent and private schooling tuition fees, school fees and sports fees.</small>	<input type="text"/>	\$ <input type="text"/>
Education - public and government <small>Incl. public or government, primary and secondary school tuition and sports fees.</small>	<input type="text"/>	\$ <input type="text"/>
Groceries <small>Incl. food, non-alcoholic beverages, toiletries and cleaning products.</small>	<input type="text"/>	\$ <input type="text"/>
Insurance - general <small>Incl. general basic insurance for ambulance, car*, travel and personal belongings. *Excluding recreation vehicles</small>	<input type="text"/>	\$ <input type="text"/>
Insurance - health <small>Incl. hospital, medical and dental insurance</small>	<input type="text"/>	\$ <input type="text"/>
Insurance - life, sickness and accident	<input type="text"/>	\$ <input type="text"/>
Medical and health care services <small>Excluding health insurance.</small>	<input type="text"/>	\$ <input type="text"/>



**Step 4 - Tell us about your Financial Position (continued)**

<p><b>Motor vehicle and transport</b> Incl. running costs for essential vehicles, public transport, taxis, ride-sharing and non holiday domestic airfares.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Pet care</b> Incl. pet food, grooming, minding services, care products, health products and veterinarian fees.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Property - investment</b> Costs associated with any property owned for investment purposes incl. land tax, body corporate fees, travel and personal belongings insurance.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Property - land tax and body corporate fees on primary residence</b> Excluding investment properties and secondary residences.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Property - primary residence (owned or rented)</b> Costs associated with the primary residence incl. rates, water, sewage, utilities, appliances, furniture, home insurance and contents insurance. Excludes land tax and body corporate fees.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Property - secondary residence (owned or rented non-investment)</b> Costs associated with the secondary residence incl. land tax, body corporate fees, property management fees, utilities, home insurance and contents insurance.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Recreation and entertainment</b> Meals in/from restaurants, alcoholic beverages and tobacco products. Purchase, hire, repair of recreational personal belongings incl. electronics, computers, games consoles, AV equipment and cameras. Plus, recreational hobbies incl. gym fees, domestic holidays and gambling.</p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Telephone (home and mobile) internet, pay TV and media subscriptions</b></p>	<input type="text"/>	\$	<input type="text"/>
<p><b>Other (please specify)</b></p>	<input type="text"/>	\$	<input type="text"/>
<p><b>TOTAL MONTHLY EXPENSES</b></p>		\$	<input type="text"/>

**Step 5 - Declaration**

I/We declare that all particulars completed on this form are true and correct and are an accurate account of my/our financial position.

**Member 1\***

Signature\*

Print Name\*

Date\*

**Member 2\***

Signature\*

Print Name\*

Date\*