

# Applicant Statement of Financial Circumstances

Your financial circumstances may be relevant to the Tribunal's decision. It would be helpful if you fill in this form and bring it with you to your hearing. If you are not coming to see the Tribunal in person, please post this form to us as soon as possible. Please make a copy for your own records.

Please note that any information collected by the Tribunal may be disclosed to Centrelink at the completion of the appeal process.

## YOUR PERSONAL DETAILS

Surname: \_\_\_\_\_ First name: \_\_\_\_\_

Postal address: \_\_\_\_\_  
\_\_\_\_\_

### BANKRUPTCY

Have you ever been bankrupt?  Yes  No

If 'yes', provide date(s) on which you were declared bankrupt and discharged from bankruptcy:

Date declared: \_\_\_\_\_ Date discharged: \_\_\_\_\_

Date declared: \_\_\_\_\_ Date discharged: \_\_\_\_\_

## YOUR WORK

Employed  No paid work  Self-employed

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Work address: \_\_\_\_\_

\_\_\_\_\_ Work contact number: \_\_\_\_\_

Receiving superannuation  Receiving compensation

Fund / compensation body: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ Contact number: \_\_\_\_\_

## YOUR PARTNER'S DETAILS

Partner's surname: \_\_\_\_\_ Partner's first name: \_\_\_\_\_

Partner's occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Work address: \_\_\_\_\_

\_\_\_\_\_ Work contact number: \_\_\_\_\_

How many children / adult students live with you? \_\_\_\_\_

## INCOME

Please provide details of your (and your partner's) income, including any Centrelink payments.

### Your Income

	Amount	How often received (weekly, fortnightly, monthly etc)
Gross pay (before tax and / or other deductions are made)	\$	Per
Centrelink payment	\$	Per
Other income (eg board or lodgings)	\$	Per
Child support paid to you	\$	Per
Gross income from rental property	\$	Per
Interest on investments / shares	\$	Per
Other income	\$	Per

### Your Partner's Income

	Amount	How often received (weekly, fortnightly, monthly etc)
Gross pay (before tax and / or other deductions are made)	\$	Per
Centrelink payment	\$	Per
Other income (eg board or lodgings)	\$	Per
Child support paid to you	\$	Per
Gross income from rental property	\$	Per
Interest on investments / shares	\$	Per
Other income	\$	Per

## DEDUCTIONS

### Your Deductions

	Amount	How often paid (weekly, fortnightly, monthly etc)
Tax	\$	Per
Superannuation	\$	Per
Union dues	\$	Per
Child support paid by you	\$	Per
Any other wage / salary-related deductions	\$	Per

## Your Partner's Deductions

	Amount	How often paid (weekly, fortnightly, monthly etc)
Tax	\$	Per
Superannuation	\$	Per
Union dues	\$	Per
Child support paid by you	\$	Per
Any other wage / salary-related deductions	\$	Per

## HOUSEHOLD EXPENDITURE (for you, your partner and dependent children / adult students living with you)

General expenses	How often paid	
Rent or mortgage	\$	Per
Council rates	\$	Per
Water / sewerage rates	\$	Per
House insurance	\$	Per
Contents insurance	\$	Per
Life insurance	\$	Per
Private health insurance	\$	Per
Electricity	\$	Per
Telephone	\$	Per
Gas or other heating	\$	Per
Other	\$	Per
Child / student education	\$	Per

Household expenses	How often paid	
Groceries	\$	Per
Medical	\$	Per
Dental	\$	Per
Chemist	\$	Per
Tools / books	\$	Per
Clothing	\$	Per
Sport	\$	Per
Child care	\$	Per
Clothing / shoes	\$	Per
Entertainment	\$	Per
Other	\$	Per
	\$	Per

Transport expenses	How often paid	
Car registration	\$	Per
Car insurance	\$	Per
Petrol	\$	Per
Car repairs	\$	Per
Public transport fares	\$	Per
Parking fees	\$	Per
Other	\$	Per

## Regular Payments (eg for credit card, store hire purchase, rental of equipment)

Money owed to	For	Balance owing	Payment	How often paid	Date to be finalised
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	

**Other Debts** (eg personal debts, legal costs, debts to authorities like Housing Trust, Australian Taxation Office or court fines)

Money owed to	For	Balance owing	Payment	How often paid	Date to be finalised
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	
		\$	\$	Per	

**ASSETS** (what you and your partner own)

**Houses or Other Real Estate**

Address of property	Owner details (eg self, joint, other)	% Owned	Current value
			\$
			\$

**Items of Property** (eg car, boat, caravan)

Description	Owner details (eg self, joint, other)	% Owned	Current value
			\$
			\$

**Money in a Financial Institution**

Name of financial institution	Branch	Account number	Account holder details (eg self, joint, other)	Current balance
				\$
				\$
				\$

**Money Held in Stocks, Bonds, Debentures**

Name of stocks, bonds etc	Owner details (eg self, joint, other)	% Owned	Current market value*	Expiry date	Interest rate	When interest paid**	How often interest paid^
			\$				
			\$				
			\$				

\* The money you would get for the shares if you sold them now

\*\* The month in which you receive the interest

^ Quarterly or half-yearly

**Interests in a Company or Trust**

Description	Owner details (eg self, joint, other)	% Owned	Current value
			\$
			\$

**Money Owed to You** (eg tax refund, insurance payment, personal loan, Director's loan etc)

Amount	Name of person / institution / business who owes you money	Address of person / institution / business who owes you money	Expected pay date
\$			
\$			
\$			

**Compensation Claims** (give details of received or outstanding compensation claims)

Amount	Claim reference number (if known)	Insurance company / employer involved	Actual or expected pay date
\$			
\$			
\$			

Is there anything else that should be taken into account when looking at your financial situation?

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**STATEMENT**

I declare that the information on this form is complete and correct.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_