



Personal Money Plan

Date (DD/MM/YYYY)

Section 1 – Customer details

Applicant's name	Employment type	Family status	No. of dependants
Other applicant's name	Other applicant's employment type		

Section 2 – Income details (after tax)

Income	Frequency	Amount (\$)	Details
Salary/Wages/Self-employed income			
Centrelink benefits			
Other applicant's income			
Other income 1			
Other income 2			
Other income 3			

Section 3 – CBA liabilities and repayments

	Product	Repayment frequency	Repayment amount (\$)	Balance (\$)	Assistance required?
Product 1					Yes No
Product 2					Yes No
Product 3					Yes No
Product 4					Yes No
Product 5					Yes No
Product 6					Yes No
Product 7					Yes No
Product 8					Yes No
Product 9					Yes No
Product 10					Yes No

Section 4 – Other financial institution liabilities and repayments

	Institution	Product	Repayment frequency	Repayment amount (\$)	Balance (\$)
Product 1					
Product 2					
Product 3					
Product 4					
Product 5					
Product 6					
Product 7					
Product 8					
Product 9					
Product 10					

Section 5 – Assets

Asset	Description	Amount (\$)
House/Property		
Savings, Funds and Shares		
Car/Vehicle		
Other assets		

Section 6 – Expenses

Expense	Frequency	Amount (\$)	Expense category
Rent			
Food and groceries			
Primary residence maintenance			
Electricity			
Gas			
Water			
Rates			
Tertiary and public education			
Phone, internet and streaming			
Transport and auto			
Clothing and personal care			
Insurance			
Medical, health and fitness			
Dependants and pets			
Recreation, travel and entertainment			
Other expenses 1			
Other expenses 2			
Other expenses 3			

Comments