

POST RELATIONSHIP BINDING FINANCIAL AGREEMENT QUESTIONNAIRE

Date: / /

1. Your personal details

Your name:

Previous/other name(s):

Current address:

Mobile:

Email:

Date of Birth:

Place of Birth:

Your occupation:

Name and address of your employer:

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Your income (per annum):

Your qualifications:

2. Personal details of your spouse/partner

Spouse/partner's name:

Previous/other name(s):

Current address:

Mobile:

Email:

Date of Birth:

Place of Birth:

Spouse/partner's occupation:

Name and address of your spouse/partner's employer:

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Spouse/partner's income (per annum):

Spouse/partner's qualifications:

3. Details of marriage/relationship status

Date of Cohabitation:

Date of Marriage:
 Has either party been previously married:
 Do either party have children from previous marriage(s):
 Do you have children from this relationship:
 Date of Separation:
 Date of Divorce:

4. Child/children of the marriage/relationship (if applicable)

Child 1 Full name: (M / F) Date of Birth: / /
 Address/current living arrangements:
 Child's School and Grade:
 Child 2 Full name: (M / F) Date of Birth: / /
 Address/current living arrangements:
 Child's School and Grade:
 Child 3 Full name: (M / F) Date of Birth: / /
 Address/current living arrangements:
 Child's School and Grade:
 Child 4 Full name: (M / F) Date of Birth: / /
 Address/current living arrangements:
 Child's School and Grade:

5. Health

Are you in good health?
 If not, provide details:
 Is your partner/spouse in good health?
 If not, provide details:
 Are the children in good health?
 If not, provide details:

6. Schedule Of Property

Description (Please provide the information requested below. Enter "N/A" if not applicable)	Estimated present value / value attributed by valuer	Owner	Valuation required?
Real estate [detail of address of each property and real property description]			
	\$		Yes / No
	\$		Yes / No

	\$		Yes / No
	\$		Yes / No
Bank, building society or credit union accounts [detail of institution, account number, account name for each account, balance in account]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Motor vehicles [detail of year, make, model and registration number of each vehicle]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Furniture, chattels and whitegoods [Provide detailed inventory of furniture including antiques, heirlooms, whitegoods, electricals, silverware and other contents]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Jewellery			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Artwork [name of artist and painting of each piece of work]			
	\$		Yes / No

	\$		Yes / No
	\$		Yes / No
Wine/liquor cellar [inventory of any wine or liquor of value]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Stamp, coin and/or other collection of valuables [catalogue of collection]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Shares (including options) in publicly listed companies, units in public unit trusts, securities, bonds and other investments [details of number of shares/units etc held, name of company/trust etc, calls outstanding and type of share for each shareholding etc]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Life policies [details of insurance company, policy number, type of policy and beneficiary for each life policy, current surrender value of policy]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Boats [detail of type of boat and present mooring]			
	\$		Yes / No
	\$		Yes / No

	\$		Yes / No
Companies [number of shares, type of shares, name of company, ABN number and office held in company, if any eg director]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Trusts [name of trust, nature of trust, trustee, interest held in trust, eg beneficiary (indicate class of beneficiary)/principal etc and any powers (eg power of appointment)]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Partnerships and Joint Ventures [Name of partnership, share (eg%) and interest held (in capital and income)]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Sole Proprietorship [Name of and details of business]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Loans Owed to Either Party [Name of Debtor or Entity]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Inheritances [Details of name of estate and interest in estate (anticipated/realised)]			

	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Compensation [Details of any compensation entitlement (anticipated/realised) (eg for personal injury, type of payment received (eg lump sum) and amount)]			
	\$		Yes / No
	\$		Yes / No
	\$		Yes / No
Other Property [Details of overseas assets/Managed Investment Scheme Interests/livestock/machinery/recreational items of value]			
	\$		
	\$		
	\$		
TOTAL ASSETS	\$		

Description (Please provide the information requested below. Enter "N/A" if not applicable)	Estimated present value / valuer	Owner	Valuation required?
Credit Cards [Details of credit provider and account number – credit card limit and current balance]			
	\$		
	\$		
	\$		
Taxation liability			
	\$		
	\$		

	\$		
Loans Owed to Either Party [Details of creditor or entity]			
	\$		
	\$		
	\$		
Mortgages and other secured personal loans [Details of institution, type of loan (eg housing loan), account number and security, eg over home]			
	\$		
	\$		
	\$		
Overdraft Facilities [Detail of institution and account number]			
	\$		
	\$		
	\$		
Leases, Hire Purchase and Other Credit Facilities [Detail of institution, type of facility and account number]			
	\$		
	\$		
	\$		
Other liabilities (including Contingent Liabilities eg Guarantees) [Details]			
	\$		
	\$		
	\$		
TOTAL LIABILITIES	\$		

NET PROPERTY EXCLUDING SUPERANNUATION	\$		
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Description (Please provide the information requested below. Enter "N/A" if not applicable)	Estimated present value / valuer	Owner	Valuation required?
Superannuation [Details of superannuation fund name, name of trustee, interest held in fund]			
	\$		
	\$		
	\$		
Private Schemes [Name of institution, superannuation fund name, membership or account number] – present surrender value]			
	\$		
	\$		
	\$		
Other Entitlements			
	\$		
	\$		
TOTAL SUPERANNUATION			
NET PROPERTY INCLUDING SUPERANNUATION			

7. Additional notes

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