

PERSONAL STATEMENT OF FINANCIAL POSITION AT / / 20__

PERSONAL INFORMATION:	
Full Name:	Date of Birth:
Occupation:	Business Ph: Home Ph:
Full Address:	

FINANCIAL INFORMATION:																																																																																	
LIABILITIES			ASSETS																																																																														
Overdraft (Name of Lender):	Limit \$	Amount Owing \$	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td colspan="2" style="background-color: #0070C0; color: white; text-align: left; padding: 2px;">Cash on Hand</td> <td style="padding: 2px; text-align: right;">Owner's estimated market value \$</td> </tr> <tr> <td style="padding: 2px;">Accounts (Bank, Credit Union etc)</td> <td style="padding: 2px;"></td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td style="padding: 2px;"></td> <td style="padding: 2px;"></td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td style="padding: 2px;"></td> <td style="padding: 2px;"></td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Share Portfolio:</td> <td style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Stock</td> <td style="padding: 2px;">No. of Shares @ \$</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td style="padding: 2px;">Stock</td> <td style="padding: 2px;">@ \$</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Real Estate:</td> <td style="padding: 2px;"></td> </tr> <tr> <td colspan="3" style="padding: 2px;">1.Address</td> </tr> <tr> <td style="padding: 2px;">Purchase Price \$</td> <td style="padding: 2px;">Purchase Date / /</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="3" style="padding: 2px;">2.Address</td> </tr> <tr> <td style="padding: 2px;">Purchase Price \$</td> <td style="padding: 2px;">Purchase Date / /</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="3" style="padding: 2px;">3.Address</td> </tr> <tr> <td style="padding: 2px;">Purchase Price \$</td> <td style="padding: 2px;">Purchase Date / /</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Motor Vehicles (Insurer:)</td> <td style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Make & Model</td> <td style="padding: 2px;">Year of Manf</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td style="padding: 2px;">Make & Model</td> <td style="padding: 2px;">Year of Manf</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Other Assets</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;"></td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Life Policies (Insurer:)</td> <td style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Sum Insured: \$</td> <td style="padding: 2px;">Annual Prem \$</td> <td style="padding: 2px; text-align: right;">Surrender Value \$</td> </tr> <tr> <td style="padding: 2px;">\$</td> <td style="padding: 2px;">\$</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">TOTAL ASSETS</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Superannuation (Est current payout)</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Fund Manager:</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> <tr> <td colspan="2" style="padding: 2px;">Furniture & Household Effects (Insurer:)</td> <td style="padding: 2px; text-align: right;">\$</td> </tr> </table>	Cash on Hand		Owner's estimated market value \$	Accounts (Bank, Credit Union etc)		\$			\$			\$	Share Portfolio:			Stock	No. of Shares @ \$	\$	Stock	@ \$	\$	Real Estate:			1.Address			Purchase Price \$	Purchase Date / /	\$	2.Address			Purchase Price \$	Purchase Date / /	\$	3.Address			Purchase Price \$	Purchase Date / /	\$	Motor Vehicles (Insurer:)			Make & Model	Year of Manf	\$	Make & Model	Year of Manf	\$	Other Assets		\$			\$	Life Policies (Insurer:)			Sum Insured: \$	Annual Prem \$	Surrender Value \$	\$	\$	\$	TOTAL ASSETS		\$	Superannuation (Est current payout)		\$	Fund Manager:		\$	Furniture & Household Effects (Insurer:)		\$
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Furniture & Household Effects (Insurer:)		\$																																																																															
Mortgages/Secured Home Loans																																																																																	
1.Name of Lender:	Repay Amount: \$	\$																																																																															
Security provided/address:																																																																																	
2.Name of Lender:	Repay Amount: \$	\$																																																																															
Security provided/address:																																																																																	
Unsecured Loans/Personal Loans																																																																																	
1.Name of Lender:	Repay Amount: \$	\$																																																																															
2.Name of Lender:	Repay Amount: \$	\$																																																																															
Lease/Hire Purchase																																																																																	
1.Name of Lender:	Repay Amount: \$	\$																																																																															
Asset Purchased:																																																																																	
2.Name of Lender:	Repay Amount: \$	\$																																																																															
Asset Purchased:																																																																																	
Credit/Store Cards (include even if balance is nil)																																																																																	
Card Type	Issuer	Card Limit \$																																																																															
		\$																																																																															
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TOTAL LIABILITIES		\$																																																																															
Contingent Liabilities (eg Personal guarantors)																																																																																	

DECLARATION:

I, the undersigned, after enquiry declare as follows:

- a) I am authorised to make this declaration.
- b) I acknowledge the information provided on this proposal is true, factual and correct and authorise inquiries by CBL Insurance Limited for the purpose of approving this application.

Signed & Dated by Applicant / / 20__

Signed & Dated by Joint Applicant / / 20__

Send this completed application form together with any relevant documentation to:
 CBL Insurance Ltd, Tower One, The Shortland Centre, 51 Shortland St, P O Box 3772, Auckland.
 Phone 09 303 4770, Fax 09 300 5046 Email inquiry@cblinsurance.com