

PRIVATE AND CONFIDENTIAL

INCOME AND EXPENDITURE STATEMENT

Surname _____ Given name _____

Address _____ Post Code _____

Date of Birth _____ Age _____ Relationship status _____

Occupation/Specialisation _____

Where/when training completed _____

Preferred telephone contact _____

Preferred Email _____

Who else lives in your household? _____

Next of Kin : Name _____ Relationship _____ Telephone _____

Have you contacted us for assistance before? If so, when? _____

Are you currently receiving assistance or support from any other organisations? If so, please provide details

INCOME:

	Your Income	Your Partner's Income
Salary (net)	_____	_____
Centrelink	_____	_____
Child support	_____	_____
Any other income	_____	_____

ASSETS:

(if you are partnered or married, please declare your combined assets)

Property _____

Shares _____

Bank Accounts _____

Vehicles _____

Home Contents _____

DEBTS:

Mortgage _____
Personal Loan _____
Credit Card (s) _____
Other _____

EXPENDITURE:

	Amount \$	Frequency	Payment Method Eg: BPay, EFT	Name of institution
Mortgage				
Rent				
Water Rates				
Council Rates				
Electricity				
Gas				
Telephone/Internet				
Health Fund				
Home & Contents Insurance				
Indemnity Insurance				
Income protection				
CTP Insurance				
Car Registration				
Credit Card (s)				
Food/Household				
Other (eg medical/ pharmacy)				

DECLARATION:

The facts and figures presented in this statement are accurate and form, to the best of my knowledge a true representation of my financial position.

By completing and returning this form I consent to the collection, use and disclosure of my personal information in accordance with Medical Benevolent Association NSW's Privacy Policy. A copy of the Policy is available on the MBANSW website www.mbansw.org.au or by telephone request.

Signed: _____

Name: _____

Date: _____

Referred By: _____

Please return completed form to:

Social Work Team

Medical Benevolent Association of NSW

Email: support@mbansw.org.au

Fax: 02 9987 2970

Telephone: 02 9987 0504