

Please complete this form to outline the intended exit strategy for the home loan.
Complete all relevant sections and provide supporting information where applicable.

Applicant Details

Applicant Name :

Date :

Address :

City, State, Postcode :

1. Expected Retirement Age

Expected retirement age :

2. Assets Available to Repay or Service the Loan After Retirement

Select all that apply and provide details.

☐ Sale of this loan's investment security

☐ Other investment properties

☐ Term deposits

☐ Investments

☐ Other

3. Downsizing Plan (If Applicable)

Do you intend to downsize to a smaller home?

☐ Yes

☐ No

Expected timeframe :

Expected sale price :

Expected purchase price :

Additional comments :

4. Financial Planner's Statement (Optional)

☐ A financial plan or statement of advice is attached.

Additional Information (Optional)

Declaration

I confirm that the information provided is true and correct to the best of my knowledge and forms my intended exit strategy for the home loan.

Signature

Date

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