

Exit Strategy for Over 55



Your Name:

Your Address:

City, State, Postcode:

Date:

To: Zeus
Subject: Exit Strategy for Over 55

Dear Sir/Madam,

I am writing to outline my intended exit strategy for my home loan, as required for applicants aged 55 years or older at the time of application.

1. Expected Retirement Age:
2. Assets Available to Repay or Service the Loan Upon/After Retirement:
(Please tick all applicable assets and provide details)

Sale of this loans investment security

Details:

Other Investment Properties:

Suburb:

Available equity:

Term Deposits Institution:

Available Amount:

Investments (please specify)

Details:

Other (please specify)

Details:

3. Downsizing Plan (if applicable):
- Do you intend to downsize to a smaller home?

Yes

No

Expected timeframe for downsizing:
- Expected sale price of current home:

Expected purchase price of new home:
- Additional comments:

4. Financial Planner’s Statement (optional):
- I have attached a financial plan or statement of advice from a qualified Financial Planner outlining my exit strategy or ongoing repayment capability.

Additional Information (optional):
Please provide any other relevant information regarding your exit strategy:

Declaration:

I confirm that the above information is true and correct to the best of my knowledge and forms my intended exit strategy for