First-home planning sheet

Start with what you know. Leave anything uncertain blank and bring your questions to the conversation.

My timeframe and preferred areas

What matters most about my first home

Savings available for the purchase

Buying costs to check

Monthly repayment I want to discuss

Cash buffer I want to keep

These are discussion notes, not a loan application or an affordability assessment. Keep this sheet private; do not record account numbers, passwords or identity-document details.

Your next useful checks

Tick what you have explored. Circle anything you want help to understand.

- [ ] Income, savings, debts and everyday costs
- [ ] Support eligibility and required timing
- [ ] Pre-approval conditions and expiry
- [ ] Conveyancer, contract and property checks
- [ ] Deposit amount and when it is payable
- [ ] Finance conditions before bidding or signing

Questions for the conversation

1. Which deposit options could fit my circumstances?

2. What remains to be checked before I commit?

3. What will the loan and buying costs mean for my day-to-day budget?

Bring the question that matters to you.

Choose a time with Chris | 0448 010 999

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