

Exit Strategy for Over 55



Your Name: Your Address:
City, State, Postcode: Date:

To: Granite

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

Signature Date / /