



Date: ___ / ___ / 2018

CLIENT DETAILS:

Client 1: _____ Email 1: _____
D.O.B. ___ / ___ / ___ Lic. No. _____ Expiry: ___ / ___ / ___
Ph Home: _____ Ph Work: _____ Mobile: _____
Residency Status: Australian Citizen PR VISA - Type: _____ Country of Origin: _____
Relationship Status: Married Single Defacto No. of Dependants: _____
Address: _____ Duration: _____
Own Mortgage Rent Board Other

Landlord/Mortgage Details:

Landlord Name: _____ Address: _____
Agency: _____ Phone: _____
Previous Address: _____ Duration: _____
Own Mortgage Rent Board Other
Previous Address: _____ Duration: _____
Own Mortgage Rent Board Other

Client 2: _____ Email 1: _____
D.O.B. ___ / ___ / ___ Lic. No. _____ Expiry: ___ / ___ / ___
Ph Home: _____ Ph Work: _____ Mobile: _____
Residency Status: Australian Citizen PR VISA - Type: _____ Country of Origin: _____
Address: _____ Duration: _____
Previous Address: _____ Duration: _____
Previous Address: _____ Duration: _____
Number of Dependants: _____ Age of Dependants: _____

EMPLOYMENT DETAILS:

Client 1 Occupation: _____ FT / PT / Cas / Self
Employer: _____ Address: _____
Duration _____ Contact Name _____ Ph: _____
Prev Emp: _____ Previous Occupation _____ FT / PT / Cas / Self
Prev Address: _____ Duration: _____
2nd Job - Employer _____ Occupation : _____ FT / PT / Cas / Self
2nd Job - Address: _____ Duration: _____

Client 2 Occupation: _____ FT / PT / Cas / Self
Employer: _____ Address: _____
Duration _____ Contact Name _____ Ph: _____
Prev Emp: _____ Previous Occupation _____ FT / PT / Cas / Self
Prev Address: _____ Duration: _____
2nd Job - Employer _____ Occupation : _____ FT / PT / Cas / Self
2nd Job - Address: _____ Started: ___ / ___ / ___

INCOME DETAILS:

Client 1 \$ _____ / week / fortnight / Month / year

Bonus / Overtime / Allowance / Salary Sacrifice / Shift loading \$ _____ / week / fortnight / month / year

2nd Job : \$ _____ / week / fortnight / Month / year

Client 2 \$ _____ / week / fortnight / Month / year

Bonus / Overtime / Allowance / Salary Sacrifice / Shift loading \$ _____ / week / fortnight / month / year

2nd Job : \$ _____ / week / fortnight / Month / year

Centrelink \$ _____ / Fortnight Maintenance/Child Support \$ _____ week / fortnight / month / year

Centrelink Type: _____

Rental 1: \$ _____ / week Address 1: _____

Rental 2: \$ _____ / week Address 2: _____

Rental 3: \$ _____ / week Address 3: _____

EXPENSES:

Living Expenses Per Month

Rent or Board \$ _____

Utilities - electricity, rates, gas, water, body corporate \$ _____

Connections - phone, mobile, internet, cable TV \$ _____

Education - child care, school fees, uniforms & activities \$ _____

Food - groceries, meat, fruit & vegetables \$ _____

Transport - public, petrol, registration, insurance & servicing \$ _____

Medical - private health insurance & ongoing medical bills \$ _____

Insurances - Home & Personal (Life/TPD/Trauma) \$ _____

Household purchases and maintenance \$ _____

Clothing/Personal Care - clothing, footwear, cosmetics \$ _____

Entertainment - dining out, movies, gifts, mag, books \$ _____

Sports, hobbies and memberships \$ _____

Other regular expenditure \$ _____

Total Living Expenses \$ _____

CURRENT ASSETS:

Main Residential: Value \$ _____

Property 1: Address _____ Value \$ _____

Property 2: Address _____ Value \$ _____

Property 3: Address _____ Value \$ _____

Cash at Bank: \$ _____ Home Contents: \$ _____

Motor Vehicles: \$ _____ Shares/ Bonds: \$ _____

Superannuation: \$ _____ Other: \$ _____ ()

CREDIT ISSUES? (Defaults/Court Judgements/Bankruptcy/Debt Collectors) _____

CURRENT LIABILITIES:

Home Loan 1: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth Interest or P & I
Home Loan 2: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth Interest or P & I
Home Loan 3: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth Interest or P & I

Car Loan 1: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth
Car Loan 2: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth

Personal Loan 1: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth
Personal Loan 2: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth
Personal Loan 3: Lender _____ Bal \$ _____ Pmt. \$ _____ / mth

Credit Card 1: Lender _____ Limit \$ _____ Bal \$ _____
Credit Card 2: Lender _____ Limit \$ _____ Bal \$ _____
Credit Card 3: Lender _____ Limit \$ _____ Bal \$ _____
Credit Card 3: Lender _____ Limit \$ _____ Bal \$ _____

Other Debt:

Other Debt: Details _____ Bal \$ _____ Pmt. \$ _____ / mth
Other Debt: Details _____ Bal \$ _____ Pmt. \$ _____ / mth

CUSTOMER OBJECTIVES:

Payment Frequency: Monthly / Fortnightly / Weekly

Desired Term: _____ Months

Balloon:

Use: Private / Business

Other Objectives:

VEHICLE DETAILS:

Make:

Model:

Variant:

Body:

Transmission:

Kilometres:

Build: _____ Compliance: _____

Colour:

Price:
Trade in:

Deposit:
Payout:
Payout to:

Approx. Amount: \$