Interview: ☐ Face to face ☐ Phone ☐ Voice call

Location:

Date & Time:

your loan assist

CLIENT NEEDS ANALYSIS

Please complete the below fields to enable us to assist you with your credit enquiry.

YOUR NEEDS & OBJECTIVES – Why do you need a loan?

PURCHASE HOUSE
BEGIN CREATING PROPERTY PORTFOLIO

Loan Amount sought: $ 700,000.00		
Have you purchased a property / signed a Contract of Sale:	☐ Yes	☑ No
Are you a First Home Buyer	☐ Yes	☑ No

PERSONAL DETAILS

	Applicant 1	**Applicant 2**
Title	MR	MS
Surname	MAGINNESS	MACKINDER
Given Name/s	SHANE CHARLES	JESSICA LEE
Preferred Name	SHANE	JESS
Previous Name		
Date of Birth (DOB)/ Gender	24.12.1984 / MALE	27.09.1984 / FEMALE
Marital Status	☐ Single ☐ Married ☑ De facto	☐ Single ☐ Married ☑ De facto
Dependents	# of	# of
Dependents DOB	13.12.2019	19.07.2009 15.07.2011 13.12.2019

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	24A MILNE TCE	19 SPINNAKER COURT
Suburb	MOONTA	WALLAROO
State / Postcode	SA 5558	SA 5556
Date moved in	7.7.2023	26.6.2025
	☐ Owns ☑ Rents ☐ Other	☐ Owns ☑ Rents ☐ Other
PREVIOUS		
Street		24A MILNE TCE
Suburb		MOONTA
State / Postcode		SA 5558
Date moved in/out	In Out	7.7.2023 In 26.6.2025 Out
MAILING (if different)		
Street	PO BOX 602	PO BOX 602
Suburb	WALLAROO	WALLAROO
State / Postcode	SA 5556	SA 5556

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0439 897 194	0419 989 263
Home Phone	☐		
Work Phone	☐		
Email Address	☑	shanecmaginness@gmail.com	jessmackinder@gmail.com

ADDITIONAL INFORMATION

Mother's Maiden Name	GREEN	MACKINDER
ID document # ***(DL/Passport)***		
Foreign Tax Status / TNN		
Town / Country of Birth	MILDURA AUSTRALIA	ADELAIDE AUSTRALIA
Estimated Retirement Age	65	65

RELATIVE NOT LIVING WITH YOU — Mother

Name	LESLEY GREEN
Phone	0434 038 111
Email	
Address	2 COTTONWOOD COURT, MILDURA, VIC

EMPLOYMENT DETAILS (Current)

	Applicant 1	**Applicant 2**
Employment type	☑ PAYG (wage) ☐ Unemployed ☐ Self Employ ☐ Retired	☑ PAYG (wage) ☐ Unemployed ☐ Self Employ ☐ Retired
Employment basis	☐ Casual ☐ Part Time ☑ Full Time ☐ Contractor	☐ Casual ☐ Part Time ☑ Full Time ☐ Contractor
Date Started	SEPT 2025	27.10.2025
Occupation	PLANT OPERATOR	ADMINISTRATION MANAGER
Income Amount (Gross / Net)	$115,000.00 pa	$89,007.00 pa $3,412.41 p/f gross $460.14 p/f salary sacrifice (general living) $2,447.85 p/f net
Pay frequency	☑ WK ☐ F/N ☐ M ☐ P/A	☐ WK ☑ F/N ☐ M ☐ P/A
EMPLOYER	M.A. SKINNER	SA HEALTH - YORKE & NORTHERN lhn
Street Address	11095 SPENCER HIGHWAY	ERNEST TCE
Suburb	WALLAROO	WALLAROO
State / Postcode	SA 5556	SA 5556
Contact Name		SUE WATKINS - DIRECTOR OF NURSING
Contact Phone number (to verify income)	08 8823 3466	08 8823 0200
On Probation	☐ Yes – time left ☐ ☑ No	☑ Yes – time left 4.5 MONTHS (26.10.26) ☐ No

EMPLOYMENT DETAILS (Previous – if less than 3 years in current position)

	Applicant 1	**Applicant 2**
Employment type	☑ PAYG (wage) ☐ Unemployed ☐ Self Employ ☐ Retired	☑ PAYG (wage) ☐ Unemployed ☐ Self Employ ☐ Retired
Employment basis	☐ Casual ☐ Part Time ☑ Full Time ☐ Contractor	☐ Casual ☐ Part Time ☑ Full Time ☐ Contractor
Date Started / Finished	/ SEPT 2025	FEB 2023 / 17.10.2025
Occupation	PLANT OPERATOR	ADMINISTRATION MANAGER
Income Amount (Gross / Net)	$110,000.00 pa	$60,000.00 pa $2,307.69 p/f gross $1,938.44 p/f net
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☑ F/N ☐ M ☐ P/A
EMPLOYER	VENTIA	ASSET 101
Street Address	OLYMPIC WAY	SUITE 7113, 252-254 HALIFAX STREET
Suburb	OLYMPIC DAM	ADELAIDE
State / Postcode	SA 5725	SA 5000
Contact Name		SCOTT BRADLEY
Contact Phone number (to verify income)		0411 600 200

Do you receive any other income (Bonus, Commission, Centrelink, Family Assistance)?

NO

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	FORD RANGER	$30,000.00	✔	☐	☐
Motor Vehicle	KIA CERATO	$25,000.00	☐	✔	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents			☐	☐	☐
Superannuation		$205,000.00	✔	☐	☐
Superannuation	REST & TRIPLE S	$94,000.00	☐	✔	☐
Other			☐	☐	☐
Other			☐	☐	☐

LIABILITIES

Type	Loan Provider	Loan Balance	Loan Limit	Repayments	Loan Term	Loan Start/End date	Fixed/IO expiry	Owner Ap1 Ap2 Both
Home Loan								☐ ☐ ☐
Home Loan								☐ ☐ ☐
Home Loan								☐ ☐ ☐
Personal Loan								☐ ☐ ☐
Personal Loan								☐ ☐ ☐
Car Loan								☐ ☐ ☐
Car Loan	PEOPLE FIRST BANK	$6,204.81		$631.11 pm	60 Mth	JULY 2022 JULY 2027	FIXED 4.65%	☐ ☐ ✔
Credit Card				N/A	N/A	N/A	N/A	☐ ☐ ☐
Credit Card				N/A	N/A	N/A	N/A	☐ ☐ ☐
Credit Card				N/A	N/A	N/A	N/A	☐ ☐ ☐
Credit Card				N/A	N/A	N/A	N/A	☐ ☐ ☐
Credit Card				N/A	N/A	N/A	N/A	☐ ☐ ☐
After Pay/ Zip Pay								☐ ☐ ☐
Other								☐ ☐ ☐

Notes:

LIVING EXPENSES (if $0.00 against any Type please enter explanation as to why)

Expense Type	Expense Amount	Frequency (WK F/N M P/A)	Total Calc Monthly	Description / Explanation
Utilities	$150	Per Month		ELECTRICITY & WATER
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	$2600	Per Month		
Transport		Per Month		
Car expenses	$500	Per Month		
Food / Groceries	$1600	Per Month		
Communication & Media		Per Month		
Medical & Health		Per Month		
Education & Childcare	$260	Per Month		OUT SCHOOL HOURS CARE FEES
Child Support/ Maintenance		Per Month		
Insurance - General	$60	Per Month		CONTENTS INSURANCE
Insurance - Health		Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	$300	Per Month		
Clothing & Personal Care		Per Month		
Gift/Donations		Per Month		
Other	$400	Per Month		BOARDING FEE FOR CHILD BORN 15.07.2011
Other		Per Month		
Other		Per Month		
TOTAL				