Interview: ☐ Face to face ☑ Phone ☐ Voice call

Location: Redland bay

Date & Time: 13/2/26

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?

To buy a home

Loan Amount sought: $		
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	
Surname	De-vreede	
Given Name/s	Christopher James	
Preferred Name	Chris	
Previous Name		
Date of Birth (DOB)/ Gender	05/09/1992 Male /	/
Marital Status	☑ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 0	# of
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	**25 Shaw place**	
Suburb	**Redland Bay**	
State / Postcode	**4165**	
Date moved in	**4/4/25**	
	❒ Owns ☑ Rents ❒ Other	❒ Owns ❒ Rents ❒ Other
PREVIOUS		
Street		
Suburb		
State / Postcode		
Date moved in/out	In Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	~~**0459 944 149**~~	
Home Phone	❒		
Work Phone	❒		
Email Address	❒		

ADDITIONAL INFORMATION

Mother's Maiden Name	**Harris**	
ID document # ***(DL/Passport)***	**101251442 DL**	
Foreign Tax Status / TNN	**415889946 Tax**	
Town / Country of Birth	**Australia**	
Estimated Retirement Age	**65**	

RELATIVE NOT LIVING WITH YOU

Name	**Mahue Devreede**
Phone	**0499330829**
Email	
Address	

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	**7/11/222**	
Occupation	**Operator**	
Income Amount (Gross / Net)	**230000**	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**Sojitz blue**	
Street Address		
Suburb		
State / Postcode		
Contact Name		
Contact Phone number (to verify income)		
On Probation	☐ Yes – time left ☑ No	☐ Yes – time left ☐ 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	/	/
Occupation		
Income Amount (Gross / Net)		
Pay frequency	☐ WK ☐ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER		
Street Address		
Suburb		
State / Postcode		
Contact Name		
Contact Phone number (to verify income)		

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

Yes up to 20000 pee year

ASSETS

Type	**Description**	**Estimated Value**	**Owner** App1 App2 Both
Principal Home			☐ ☐ ☐
Investment Property			☐ ☐ ☐
	Rental Income $		
Investment Property			☐ ☐ ☐
	Rental Income $		
Motor Vehicle	**70000**		☐ ☐ ☐
Motor Vehicle	**30000**		☐ ☐ ☐
Savings Account	**10000**		☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Home Contents	**40000**		☐ ☐ ☐
Superannuation	**190000**		☐ ☐ ☐
Superannuation			☐ ☐ ☐
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	**Cba**	**65000**		**400**				☑ ☐ ☐
Personal Loan	**Now**	**1500**		**120**				☑ ☐ ☐
Car Loan								☐ ☐ ☐
Car Loan								☐ ☐ ☐
Credit Card	**Qantas**	**2000**	**30000**	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	0			
Rates	0			
Body Corporate	0			
Ongoing Rent	1200		1200	
Transport	800		800	
Car expenses				
Food / Groceries	300		300	
Communication & Media	100		100	
Medical & Health				
Education & Childcare				
Child Support/ Maintenance				
Insurance - General				
Insurance - Health				
Insurance - Risk				
Entertainment & Recreation				
Clothing & Personal Care				
Gift/Donations				
Other				
Other				
Other				
TOTAL				

CERTIFICATE
OF DIGITAL SIGNATURE



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Completed Phone:
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