Interview: ☐ Face to face ☐ Phone ☑ Voice call

Location: Online

Date & Time: 11:30am Wednesday 5th of August 2026

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?

Hoping to purchase 2/3 bedroom villa unit in the SE suburbs. Ashood/Burrwood/Mount Waverley

Loan Amount sought: $ 750,000		
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	Church	
Given Name/s	Graham Bentley	
Preferred Name		
Previous Name		
Date of Birth (DOB)/ Gender	16/02/1980 /	/
Marital Status	☑ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 2	# of
Dependents DOB	04/01/2016 & 24/09/17	

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	27 Eva	
Suburb	Malvern	
State / Postcode	Victoria	
Date moved in	30/04/2025	
	☐ Owns ☑ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street		
Suburb	Eltham	
State / Postcode	Victoria	
Date moved in/out	01/09/2023 In 30/04/2025 Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0494314900	
Home Phone	☐		
Work Phone	☐		
Email Address	☑	grahambchurch@gmail.com	

ADDITIONAL INFORMATION

Mother's Maiden Name	Harry	
ID document # ***(DL/Passport)***	PB1275686	
Foreign Tax Status / TNN		
Town / Country of Birth	Auckland New Zealand	
Estimated Retirement Age	75	

RELATIVE NOT LIVING WITH YOU Sister

Name	Jessica Holton
Phone	0413860699
Email	jessie@jessieholton.com
Address	24 Parkway Place Clifton Springs Victoria

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	01/06/2026	
Occupation	Senior Relationship Manager	
Income Amount (Gross / Net)	145,000	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	National Hearing Center	
Street Address	Level 7, 150 Lonsdale Street	
Suburb	Melbourne	
State / Postcode	Victoria	
Contact Name	Elliott	
Contact Phone number (to verify income)	0435966698	
On Probation	☑ Yes – time left 4 Months ☐ 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	01/09/2023 / 05/03/2026	/
Occupation	General Manager, Health and Aged Care	
Income Amount (Gross / Net)	165,000	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Procurement Australia	
Street Address	Level 10, 140 Collins Street	
Suburb	Melbourne	
State / Postcode	Victoria	
Contact Name	Ancila Desai	
Contact Phone number (to verify income)	0421005664	

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

ASSETS

Type	**Description**	**Estimated Value**	**Owner** App1 App2 Both
Principal Home			☐ ☐ ☐
Investment Property			☐ ☐ ☐
	Rental Income $		
Investment Property			☐ ☐ ☐
	Rental Income $		
Motor Vehicle	2021 Hyundai Santa Fe	40,000	✔ ☐ ☐
Motor Vehicle			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Home Contents			☐ ☐ ☐
Superannuation			☐ ☐ ☐
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	15,000		100 P/W	4 yEARS	22/07/26		✔	☐	☐
Personal Loan								☐	☐	☐
Car Loan	Angle Auto Finance	38,000		500 p/f				✔	☐	☐
Car Loan								☐	☐	☐
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	0	Per Month		Included in rent
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	1550	Per Month		
Transport	100	Per Month		
Car expenses	20	Per Month		
Food / Groceries	400	Per Month		
Communication & Media	28	Per Month		
Medical & Health	10	Per Month		
Education & Childcare	100	Per Month		
Child Support/ Maintenance		Per Month		
Insurance - General	100	Per Month		
Insurance - Health	100	Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	200	Per Month		
Clothing & Personal Care	50	Per Month		
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				