Interview: ☐ Face to face ☐ Phone ☑ Voice call

Location: 0494 314 900

Date & Time: TBA

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 an apartment and consolodate debt

Loan Amount sought: $ **800,000**		
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** / **Male**	/
Marital Status	☑ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of **2 (50/50)**	# of
Dependents DOB	**04/01/2016 & 24/09/2017**	

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	**27 Eva Street**	
Suburb	**Malvern**	
State / Postcode	**VICTORIA**	
Date moved in	**01/09/2024**	
	❒ Owns ☑ Rents ❒ Other	❒ Owns ❒ Rents ❒ Other
PREVIOUS		
Street	**13 Howell Street**	
Suburb	**Mount Waverley**	
State / Postcode	**Victoria**	
Date moved in/out	**01/03/2024** In **01/09/2024** Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	**~~0494 314 900~~**	
Home Phone	❒		
Work Phone	❒	**0475821932**	
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

Name	**Jessica Holton (Sister)**
Phone	**0413 860 699**
Email	**jessie@jessieholton.com**
Address	**24 Parkway Place, Clifton Springs**

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	**09/12/2025**	
Occupation	**General Manager, Health & Aged Care**	
Income Amount (Gross / Net)	**Base Pay Rate $144,200**	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**Procurement Australasia Limited**	
Street Address	**Level 10, 440 Collins Street**	
Suburb	**Melbourne**	
State / Postcode	**Victoria 3000**	
Contact Name	**Ms Ancila Desai - CFO**	
Contact Phone number (to verify income)	**0400 972 117**	
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	**01/03/2020** / **09/12/2024**	/
Occupation		
Income Amount (Gross / Net)	**Base Pay $122,000**	
Pay frequency	☐ WK ☐ F/N ☑ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**Braeside Mills Operations Pty Ltd,**	
Street Address	**29 â€“ 39 Mills Road |**	
Suburb	**Braeside**	
State / Postcode	**VIC 3195, Australia**	
Contact Name	**Madelyn Cobern**	
Contact Phone number (to verify income)	**0499 733 800**	

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

Discrecionary bonus from Procurement Australia

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**	**40000**	☑	☐	☐
Motor Vehicle			☐	☐	☐
Savings Account	**Commonwealth Bank**	**2000**	☑	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	**Funiture**	**50000**	☑	☐	☐
Superannuation	**SMSF**	**415000**	☑	☐	☐
Superannuation			☐	☐	☐
Other	**Boat**	**400**	☐	☐	☐
Other	**Campervan**	**5000**	☐	☐	☐

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	Commonwealth Bank	4923	12993	10 p/w	3 years	01/03/2024	01/03/2027	☑	☐	☐
Personal Loan								☐	☐	☐
Car Loan	Angle Auto Finance			423 P/Fortnight	7 YEARS			☑	☐	☐
Car Loan								☐	☐	☐
Credit Card	Commonwealth Bank	2849	3000	N/A	N/A	N/A	N/A	☑	☐	☐
Credit Card	ANZ	9843	10000	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				
Rates				
Body Corporate				
Ongoing Rent			1550	
Transport			100	
Car expenses			200	
Food / Groceries			600	
Communication & Media			100	
Medical & Health				
Education & Childcare				
Child Support/ Maintenance				
Insurance - General				
Insurance - Health			120	
Insurance - Risk				
Entertainment & Recreation			500	
Clothing & Personal Care			100	
Gift/Donations				
Other				
Other				
Other				
TOTAL			3270	

CERTIFICATE
OF DIGITAL SIGNATURE



THIS DOCUMENT HAS BEEN DIGITALLY SIGNED WITH THE FOLLOWING DETAILS

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