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?

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	Mrs
Surname	Artates	Artates
Given Name/s	Christian	Belinda
Preferred Name	Christian	Belinda
Previous Name		
Date of Birth (DOB)/ Gender	21/12/1980 / Male	11/01/1985 / Female
Marital Status	☐ Single ☑ Married ☐ De facto	☐ Single ☑ Married ☐ De facto
Dependents	# of 1	# of 1
Dependents DOB	08/05/2015	08/05/2015

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	1 Hobson Place	1 Hobson Place
Suburb	Boronia Heights	Boronia Heights
State / Postcode	QLD	QLD
Date moved in	Sept 2024	Sept 2024
	✔ Owns ☐ Rents ☐ Other	✔ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	3 Ramblingwood Court	3 Ramblingwood Court
Suburb	Algester	Algester
State / Postcode	QLD	QLD
Date moved in/out	In Sept 2024 Out	In Sept 2024 Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☐	0430207414	0427078669
Home Phone	☐		
Work Phone	☐		
Email Address	✔	artates_7@hotmail.com	barty036@gmail.com

ADDITIONAL INFORMATION

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

RELATIVE NOT LIVING WITH YOU Brother

Name	Francis Artates
Phone	0412589772
Email	
Address	32 Dart Place Parkinson, QLD

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		30 March 2025
Occupation	Teacher	Reconciliation Action Lead
Income Amount (Gross / Net)		125000
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☑ F/N ☐ M ☐ P/A
EMPLOYER	Queensland Education - Harris Fields	RACQ
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	/	Feb 2018 / March 2025
Occupation		Multiple roles
Income Amount (Gross / Net)		100000
Pay frequency	☐ WK ☐ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER		Suncorp
Street Address		
Suburb		
State / Postcode		
Contact Name		
Contact Phone number (to verify income)		

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

no

ASSETS

Type	Description	Estimated Value	Owner App1	Owner App2	Owner Both
Principal Home			☐	☐	☑
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	Mitsubishi Outlander	24000	☑	☐	☐
Motor Vehicle	Honda Jazz	5000	☑	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents		120000	☐	☐	☑
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								☐ ☐ ☐
Personal Loan								☐ ☐ ☐
Car Loan								☐ ☐ ☐
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	120	Per Month	120	
Rates	892	Per Month	327	
Body Corporate	81	Per Month	81	
Ongoing Rent		Per Month	0	N/A
Transport		Per Month	0	N/A included in car expenses
Car expenses	130	Per Week	260	2x vehicles
Food / Groceries	150	Per Week	600	
Communication & Media	300	Per Month	300	phones & internet
Medical & Health	30	Per Month	30	
Education & Childcare	325	Per Fortnight	650	
Child Support/ Maintenance		Per Month	0	N/A
Insurance - General	304	Per Month	304	2x car insurance & Home & contents insurance
Insurance - Health	168	Per Month	168	
Insurance - Risk		Per Month	0	N/A
Entertainment & Recreation		Per Month	150	
Clothing & Personal Care		Per Month	100	
Gift/Donations		Per Month	0	N/A
Other		Per Month	0	
Other		Per Month	0	
Other		Per Month	0	
TOTAL				