Client Application Form

Super Property

General Details

Client 1

First Name

Karyn

Last Name

Paget

Marital Status

Single

Address

9 Ulva Avenue Warradale SA 5046

Date of Birth

14.09.1970

Email Address

14karyn@gmail.com

Phone Number

0413084789

Client 2 (If Applicable)

First Name

Last Name

Marital Status

Address

Date of Birth

Email Address

Phone Number

Are you an Australian Citizen

Yes

What is your current living status?

Renting

Balance owing on your mortgage? (If Applicable)

Balance owing on Investment Property (If Applicable)

Yes

Have you ever purchased a home before?

No

Do you qualify for the First Home Owners Grant?

Are you an Australian Citizen

Yes

What are your weekly rental payments?

$675

Do you have an investment property

Weekly Repayments on Investment Property

Do you have any dependants? (Please list ages)

Application Form

Super Property

Employment Status

Client 1

Employment Status

NOV 2013

Employment Start Date

140000

Gross Annual Salary

Registered Nurse

Occupation

No

Is any income received from bonuses?

Client 2 (If Applicable)

Employment Status

Employment Start Date

Gross Annual Salary

Occupation

Is any income received from bonuses?

Financial DetailsPersonal Loan

Personal Loan 1 Lender:

Personal Loan 1 Balance:

Personal Loan 1 Total Amount:

Personal Loan 1 Interest rate/Repayment Amount:

Car Loan 1 Lender:

Mazda finance

Car Loan 1 Balance:

$41376.21

Car Loan 1 Total Amount:

Unsure

Car Loan 1 Interest Rate/Repayment Amount:

Unsure - only been paying for 11 months of a 4 year loan

Personal Loan 2 Lender:

Personal Loan 2 Balance:

Personal Loan 2 Total Amount:

Personal Loan 2 Interest rate/Repayment Amount:

Car Loan 2 Lender:

Car Loan 2 Balance:

Car Loan 2 Total Amount:

Car Loan 2 Interest Rate/Repayment Amount:

Client Application Form

Super Property

Financial Details

Credit Card 1 Lender:

NAB

Credit Card 1 Balance:

$5000

Credit Card 1 Limit:

Credit Card 1 Interest Rate/Repayment Amount:

GE finance

Credit Card 3 Lender:

$10000

Credit Card 3 Balance:

Credit Card 3 Limit:

Credit Card 3 Interest Rate/Repayment Amount:

Credit Card 2 Lender:

ME

Credit Card 2 Balance:

1500

Credit Card 2 Limit:

Credit Card 2 Interest Rate/Repayment Amount:

Credit Card 4 Lender:

Credit Card 4 Balance:

Credit Card 4 Limit:

Credit Card 4 Interest Rate/Repayment Amount:

What debts would you like consolidated? (subject to serviceability)

Credit cards

Client Application Form

Super Property

Financial Details

Savings and Superannuation

What is you combined superannuation amount?

600000

How much savings would you like to use?

Do you own any shared outside of superannuation?

No

How much would you be able to to save for a home per week?

How much do you pay on your debts per week?

House and Land Details

How much would you like to spend on your house and land?

500000 -- 700000

How many bedrooms/ bathrooms do you require?

2 - 3 bedrooms, 2 bathroomsAd

What location would you like to build/ buy in?

Adelaide

Property Type: Established, construction, new never occupied

Established, construction,new never occupied

CERTIFICATE
OF DIGITAL SIGNATURE



THIS DOCUMENT HAS BEEN DIGITALLY SIGNED WITH THE FOLLOWING DETAILS

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Completed Phone:
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