Interview: ☑ Face to face ☐ Phone ☐ Voice call

Location: WA

Date & Time: 23/4/2026

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?

Bunbury WA 6230

Deb Consolidation of
Power Finance car loan
Toyota Finance car loan
Personal Loan - Lattitude
Personal Loan - BOQ

Loan Amount sought: $ 650000		
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	Mrs	Mrs
Surname	Smith	Smith
Given Name/s	Debbra	Christina
Preferred Name		
Previous Name		
Date of Birth (DOB)/ Gender	16/01/1972 / female	09/06/1970 / female
Marital Status	☐ Single ☑ Married ☐ De facto	☐ Single ☑ Married ☐ De facto
Dependents	# of	# of
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	8 Kitcher PARADE	8 Kitcher PARADE
Suburb	McKail	McKail
State / Postcode	WA 6330	WA 6330
Date moved in	13 Oct 2018	13 Oct 2018
	☐ 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	☑	0400276078	0422945423
Home Phone	☐		
Work Phone	☐		
Email Address	☑	debbra.smith1972@gmail.com	chrisgsmith1970@gmail.com

ADDITIONAL INFORMATION

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

RELATIVE NOT LIVING WITH YOU — Mother

Name	
Phone	
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	08/02/2016	
Occupation	Prison Officer	
Income Amount (Gross / Net)	$110,000	
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)		
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)?

ASSETS

Type	**Description**	**Estimated Value**	**Owner** App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	Mitsubishi Triton 2025	$69,000	✔	☐	☐
Motor Vehicle	Toyota Koba chr	$28,000	☐	✔	☐
Savings Account	Bankwest	$3000	✔	☐	☐
Savings Account	Bankwest	$1500	✔	☐	☐
Savings Account	NAB	$3200	✔	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	General	$50,000	☐	☐	✔
Superannuation			☐	☐	☐
Superannuation			☐	☐	☐
Other	Camper Trailer	$10000	☐	☐	✔
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	Lattitude Finance	$4600		$78 week				✔	☐	☐
Personal Loan	BOQ	$3500		$420 pm				☐	☐	☐
Car Loan	Power Alliance	$50,000		$420 fn				✔	☐	☐
Car Loan	Toyota Finance	$3500		$213 fn				☐	✔	☐
Credit Card	Bankwest		$3000	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	$150	Per Month	$150	
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	$450	Per Week	$1955.36	
Transport	$70	Per Week	$305.00	
Car expenses	$125	Per Month	$125	
Food / Groceries	$150	Per Week	$651.00	
Communication & Media	$150	Per Month	$150	
Medical & Health		Per Month		
Education & Childcare		Per Month		
Child Support/ Maintenance		Per Month		
Insurance - General		Per Month		
Insurance - Health		Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	$150	Per Month	$150	
Clothing & Personal Care		Per Month		
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				