Interview: ☐ Face to face ☑ Phone ☐ Voice call

Location: Melbourne

Date & Time: 15 May 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?

The suburbs they want to consider are: Euroa, (3666) Katamatite, (3649) Benalla, (3672) Violet Town, (3669) Katunga (3640)

Loan Amount sought: $ 360,000		
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	Ms	Mr
Surname	Clapham	Mitchell
Given Name/s	Sharon	Colin Mark
Preferred Name	Sharon	Colin
Previous Name		
Date of Birth (DOB)/ Gender	15/10/1964 /	04/03/1964 /
Marital Status	☐ Single ☐ Married ☑ De facto	☐ Single ☐ Married ☑ De facto
Dependents	# of NIL	# of
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	82 Snowy Lane	82 Snowy Lane
Suburb	Benalla	Benalla
State / Postcode	Victoria, 3672	Victoria, 3672
Date moved in	November 2024	November 2024
	☐ Owns ☑ Rents ☐ Other	☐ Owns ☑ Rents ☐ Other
PREVIOUS		
Street	15 Manley Road	15 Manley Road
Suburb	Devenish	Devenish
State / Postcode	Victoria	Victoria
Date moved in/out	Nov 2019 In November 2024 Out	Nov 2019 In November 202 Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☐		0481 967 101
Home Phone	☐		
Work Phone	☐		
Email Address	☐		colinmarkmitchell@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	August 2024	November 2022
Occupation	Disability Support Worker	Quarry Worker
Income Amount (Gross / Net)	$	$61,000
Pay frequency	☑ WK ☐ F/N ☐ M ☐ P/A	☑ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Sharon Clapham	Redstone Crushing & Plant Hire
Street Address	82 Snowy Lane	11 Provincial Crescent
Suburb	Benalla	Shepparton
State / Postcode	Victoria, 3672	Vic, 3630
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	May 2019 / August 2024	/
Occupation	Disability Support Worker	
Income Amount (Gross / Net)	$	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Community Accessibility Pty Ltd	
Street Address	7/67 Wigg Street	
Suburb	Wodonga	
State / Postcode	Victoria	
Contact Name		
Contact Phone number (to verify income)		

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

From March 2023 to November 2024
I am Support Services
Address: 120 Tone Road Wangaratta, 3677

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	Holden Cruze 2013	$10,000	☐	☐	☐
Motor Vehicle	VE Commodore Ute 2010	7,000	☐	☐	☐
Savings Account	ING Direct	$5,200	☐	✔	☐
Savings Account	NAB	$51,492	☐	☐	✔
Savings Account	NAB	$5,000	✔	☐	☐
Savings Account	NAB	$2,500	☐	✔	☐
Savings Account	NAB	$647	✔	☐	☐
Home Contents	Furniture		☐	☐	✔
Superannuation	SMSF	$173,000	☐	☐	✔
Superannuation	North Super & Team Super	$35,000	☐	☐	☐
Other	BA Falcon Ute 2004 & Mazda BT50 2013	$19,000	☐	☐	☐
Other	Caravan & Trailer	$32,000	☐	☐	✔

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	NAB Visa	$1,540	$2,000	N/A	N/A	N/A	N/A	✔	☐	☐
Credit Card	NAB Visa	$1,800	$2,000	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		Per Month		
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	$2,167	Per Month		
Transport		Per Month		
Car expenses		Per Month		
Food / Groceries		Per Month		
Communication & Media		Per Month		
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		Per Month		
Clothing & Personal Care		Per Month		
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				