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?

To invest in future

Loan Amount sought: $ **550000**		
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	**Boyce**	**Boyce**
Given Name/s	**Scott**	**Michelle louise**
Preferred Name	**Scott**	**Michelle**
Previous Name		
Date of Birth (DOB)/ Gender	**30/06/1978** / **Male**	**21/01/1978** / **Female**
Marital Status	❒ Single ☑ Married ❒ De facto	❒ Single ☑ Married ❒ De facto
Dependents	# of **2**	# of
Dependents DOB	**04/10/2013 25/03/2010**	

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	**9 breakwater road**	**Same**
Suburb	**Benowa**	**Same**
State / Postcode	**Qld 4226**	**Same**
Date moved in	**19 may 2022**	**Same**
	☐ 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	☑	~~**0419195223**~~	~~**0403521540**~~
Home Phone	☐		
Work Phone	☐		
Email Address	☑	**Syktlr@hotmail.com**	**Shellboyce@bigpond.com**

ADDITIONAL INFORMATION

Mother's Maiden Name	**Webb**	**Rainbow**
ID document # ***(DL/Passport)***		
Foreign Tax Status / TNN		
Town / Country of Birth	**Adelaide**	
Estimated Retirement Age	**67**	

RELATIVE NOT LIVING WITH YOU

Name	**Tony boyce**
Phone	**0413383112**
Email	
Address	**22 new st robertstown sa**

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	**June 2022**	**May 2021**
Occupation	**Diesel fitter/serviceman**	**Front of house**
Income Amount (Gross / Net)	**200000**	**25000**
Pay frequency	☑ WK ☐ F/N ☐ M ☐ P/A	☑ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**Cpb**	**Mecure hotels**
Street Address		
Suburb	**Welshpool**	
State / Postcode	**Wa**	
Contact Name	**Adam johnston**	
Contact Phone number (to verify income)	**0439694900**	
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)?

Military pension received fortnightly 820 after tax

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home			☐	☐	☐
Investment Property	**Investment property**	**540000.and 420week rent**	☐	☑	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	**Jeep srt8**	**50000**	☑	☐	☐
Motor Vehicle	**Prado kakadu**	**28000**	☐	☑	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	**Contents**	**60000**	☐	☐	☑
Superannuation	**Military super**	**370000**	☑	☐	☐
Superannuation	**Mlc**	**26000**	☐	☑	☐
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	**Liberty**	**27000**	**55000**	**670**	**7**	**Nov 2023**		☑ ☐ ☐
Personal Loan	**Aps**	**20000**	**28000**	**330**	**5**	**2024**		☑ ☐ ☐
Car Loan								☐ ☐ ☐
Car Loan								☐ ☐ ☐
Credit Card	**Nab my card**	**21000**	**25000**	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	**Afterpay**	**1500**						☐ ☐ ☐
Other								☐ ☐ ☐

Notes:

Wanting to payout credit card at a minimum

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	200		200	
Rates				
Body Corporate				
Ongoing Rent				
Transport	200		200	
Car expenses	100		100	
Food / Groceries	450		450	
Communication & Media				
Medical & Health				
Education & Childcare				
Child Support/ Maintenance				
Insurance - General				
Insurance - Health				
Insurance - Risk				
Entertainment & Recreation				
Clothing & Personal Care	300		300	
Gift/Donations				
Other				
Other				
Other				
TOTAL				

CERTIFICATE
OF DIGITAL SIGNATURE



THIS DOCUMENT HAS BEEN DIGITALLY SIGNED WITH THE FOLLOWING DETAILS

Document name:
NCCP-Client-Needs-Analysis.pdf_signed.pdf
Completed Date:
2026-05-02 12:42:02 (GMT +1000 Australia/Brisbane)
Completed by:
Scott & Michelle Boyce
Completed Email:
syktlr@hotmail.com
Completed Phone:
+610419195223
Completed ID:
323032362d30352d30322030323a34323a3036-c609be15-5764-4349-bb25-3bfa4da6b1d7
Completed IP:
1.146.131.199
Completed Platform:
Linux armv81