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: $		
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	30/6/78 / male	25/01/78 / female
Marital Status	☐ Single ☑ Married ☐ De facto	☐ Single ☑ Married ☐ De facto
Dependents	# of	# of
Dependents DOB	04/10/2013 25/03/2010	

ADDRESS DETAILS

CURRENT	Applicant 1	Applicant 2
Street	22 New St	9 Breakwater Rd
Suburb	Robertstown	Benowa
State / Postcode	SA 5381	QLD 4226
Date moved in	1/5/26	19 MAY 2022
	☐ Owns ☐ Rents ☑ Other family	☐ Owns ☑ Rents ☐ Other
PREVIOUS	0	
Street	9 Breakwater Rd	
Suburb	Benowa	
State / Postcode	QLD 4226	
Date moved in/out	19 MAY 2022 In 1/5/26 Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0419195223	0403521546
Home Phone	☐		
Work Phone	☐		
Email Address	☑	sylctlr@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	Bendigo
Estimated Retirement Age	70	

RELATIVE NOT LIVING WITH YOU ~~Mother~~ father

Name	Tony boyce
Phone	0413383112
Email	
Address	22 New St Robertstow 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	800		66	
Child Support/ Maintenance				
Insurance - General				
Insurance - Health				
Insurance - Risk				
Entertainment & Recreation				
Clothing & Personal Care	300		300	
Gift/Donations				
Other				
Other				
Other				
TOTAL				

S

Scott Boyce
to me, shellboyce4@gmail.com

Mon 13 Jul, 08:22 (1 day ago)

Rent is 850 per week in gold coast ...kids are with Michelle. I am currently in Adelaide living with family till we get a place to live in then michelle and kids come over once school year ends

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