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?

I am looking to purchase a house

Loan Amount sought: $ Don't know		
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	
Surname	Horton	
Given Name/s	John Richard	
Preferred Name	John	
Previous Name		
Date of Birth (DOB)/ Gender	11/11/1973 / Male	/
Marital Status	☑ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 2	# of
Dependents DOB	14/09/2006 31/01/2008	

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	2/4 Hodgens Street	
Suburb	Caloundra	
State / Postcode	QLD 4551	
Date moved in		
	☐ Owns ☐ Rents ☑ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	66 Panorama Drive	
Suburb	Tweed Heads	
State / Postcode	NSW 2485	
Date moved in/out	July 2022 In July 2025 Out	In Out
MAILING (if different)		
Street	5 Booyong Place	
Suburb	Nobbys Creek	
State / Postcode	NSW 2484	

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0423375957	
Home Phone	☐		
Work Phone	☐		
Email Address	☑	john.horton73@yahoo.com	

ADDITIONAL INFORMATION

Mother's Maiden Name	Sawyer	
ID document # ***(DL/Passport)***	QLD Lic 130247914	
Foreign Tax Status / TNN		
Town / Country of Birth	Castleford UK	
Estimated Retirement Age	65	

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	June 2019	
Occupation	Electrician	
Income Amount (Gross / Net)	$235,000	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	CloughWood	
Street Address	QV 1 Plaza Level 6, 250 St Georges Terrace	
Suburb	Perth	
State / Postcode	WA 6000	
Contact Name	Kevin Brannan	
Contact Phone number (to verify income)	0404159315	
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)?

No further income, i have recently finished paying off historical debt from a divorce and finished paying Child Support

ASSETS

Type	**Description**	**Estimated Value**	**Owner** App1 App2 Both
Principal Home			☐ ☐ ☐
Investment Property			☐ ☐ ☐
	Rental Income $		
Investment Property			☐ ☐ ☐
	Rental Income $		
Motor Vehicle	$25,000		☑ ☐ ☐
Motor Vehicle	Motorbike $10,500		☑ ☐ ☐
Savings Account	$35,000		☑ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Savings Account			☐ ☐ ☐
Home Contents	$25,000		☑ ☐ ☐
Superannuation	$510,000		☑ ☐ ☐
Superannuation			☐ ☐ ☐
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	Comm Bank	$9000						☑ ☐ ☐
Personal Loan								☐ ☐ ☐
Car Loan	Mazda Finance	$2500						☑ ☐ ☐
Car Loan	Harley finance	$8000						☑ ☐ ☐
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	☐ ☐ ☐
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	$1000	Per Month	1000	
Transport		Per Month		
Car expenses	$300	Per Month	300	
Food / Groceries	$300	Per Month	300	
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	$310	Per Month	310	
Insurance - Risk		Per Month		
Entertainment & Recreation	$500	Per Month	500	
Clothing & Personal Care		Per Month		
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL			$2560	