Client Application Form

Super Property

General Details

Client 1

First Name
Jason

Last Name
Peak

Marital Status
Single

Address
6 Gill Court BUNDAMBA QLD 4304

Date of Birth
25th January 1972

Email Address
jpeak72@outlook.com

Phone Number
0417160294

Client 2 (If Applicable)

First Name

Last Name

Marital Status

Address

Date of Birth

Email Address

Phone Number

Are you an Australian Citizen
Yes

What is your current living status?
Renting

Balance owing on your mortgage? (If Applicable)
Nil

Balance owing on Investment Property (If Applicable)
Nil

Have you ever purchased a home before?
yes

Do you qualify for the First Home Owners Grant?
No

Are you an Australian Citizen

What are your weekly rental payments?

Do you have an investment property

Weekly Repayments on Investment Property

Do you have any dependants? (Please list ages)

Application Form

Super Property

Employment Status

Client 1

Employment Status

Fulltime

Employment Start Date

12/05/2025

Gross Annual Salary

$220,000

Occupation

Electrical Engineer

Is any income received from bonuses?

No

Client 2 (If Applicable)

Employment Status

N/A

Employment Start Date

N/A

Gross Annual Salary

N/A

Occupation

N/A

Is any income received from bonuses?

N/A

Financial DetailsPersonal Loan

Personal Loan 1 Lender:

Personal Loan 1 Balance:

Personal Loan 1 Total Amount:

Personal Loan 1 Interest rate/Repayment Amount:

Car Loan 1 Lender:

Westpac

Car Loan 1 Balance:

32,211

Car Loan 1 Total Amount:

58,756

Car Loan 1 Interest Rate/Repayment Amount:

7.99% at $1,204/month

Personal Loan 2 Lender:

Personal Loan 2 Balance:

Personal Loan 2 Total Amount:

Personal Loan 2 Interest rate/Repayment Amount:

Car Loan 2 Lender:

Car Loan 2 Balance:

Car Loan 2 Total Amount:

Car Loan 2 Interest Rate/Repayment Amount:

Client Application Form

Super Property

Financial Details

Credit Card 1 Lender:

Commowealth Bank

Credit Card 1 Balance:

$12,000

Credit Card 1 Limit:

$12,000

Credit Card 1 Interest Rate/Repayment Amount:

Credit Card 2 Lender:

Credit Card 2 Balance:

Credit Card 2 Limit:

Credit Card 2 Interest Rate/Repayment Amount:

Credit Card 3 Lender:

Credit Card 3 Balance:

Credit Card 3 Limit:

Credit Card 3 Interest Rate/Repayment Amount:

Credit Card 4 Lender:

Credit Card 4 Balance:

Credit Card 4 Limit:

Credit Card 4 Interest Rate/Repayment Amount:

What debts would you like consolidated? (subject to serviceability)

Car Loan 1

Client Application Form

Super Property

Financial Details

Savings and Superannuation

What is you combined superannuation amount?

355,814

How much savings would you like to use?

$30,000

Do you own any shared outside of superannuation?

No

How much would you be able to to save for a home per week?

$1,500

How much do you pay on your debts per week?

$300

House and Land Details

How much would you like to spend on your house and land?

$1,000,000

How many bedrooms/ bathrooms do you require?

3-4

What location would you like to build/ buy in?

Brisbane, QLD

Property Type: Established, construction, new never occupied

Established

CERTIFICATE
OF DIGITAL SIGNATURE

THIS DOCUMENT HAS BEEN DIGITALLY SIGNED WITH THE FOLLOWING DETAILS



Document name:
SP-Client-Application-Form-2024.pdf_signed.pdf
Completed Date:
2026-02-03 19:52:22 (GMT +1000 Australia/Brisbane)
Completed by:
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323032362d30322d30332030393a35323a3233-5f3381d7-9755-488a-bad8-efd5fdf6d9b4
Completed IP:
79.127.155.168
Completed Platform:
Win32