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?

Loan Amount sought: $ **1,100,000**		
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	**Mr**	
Surname	**Peak**	
Given Name/s	**Jason**	
Preferred Name		
Previous Name		
Date of Birth (DOB)/ Gender	**25/01/1972** / **Male**	/
Marital Status	☑ Single ❒ Married ❒ De facto	❒ Single ❒ Married ❒ De facto
Dependents	# of **0**	# of
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	**2/7 Alder Street**	
Suburb	**Bellbird Park**	
State / Postcode	**QLD 4300**	
Date moved in	**11/05/2026**	
	☐ Owns ☑ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	**6 Gill Court**	
Suburb	**Bundamba**	
State / Postcode	**QLD 4304**	
Date moved in/out	**12/05/2025** In **11/05/2026** Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑		
Home Phone	☐		
Work Phone	☐		
Email Address	☐		

ADDITIONAL INFORMATION

Mother's Maiden Name	**Waddell**	
ID document # ***(DL/Passport)***	**032217873**	
Foreign Tax Status / TNN	**N/A**	
Town / Country of Birth	**Roma/ Australia**	
Estimated Retirement Age	**70**	

RELATIVE NOT LIVING WITH YOU

Name	**Robert Peak**
Phone	**0429958960**
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		
Occupation		
Income Amount (Gross / Net)	**210,000**	
Pay frequency	☐ WK ☐ F/N ☑ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**Ausenco**	
Street Address	**189 grey Street**	
Suburb	**Southbank**	
State / Postcode	**QLD 3006**	
Contact Name	**Michael McQuaid**	
Contact Phone number (to verify income)	**0487637911**	
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	**8/04/2019** / **20/04/2025**	/
Occupation	**Engineer**	
Income Amount (Gross / Net)	**133,441**	
Pay frequency	☐ WK ☐ F/N ☑ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**University of New England**	
Street Address	**Madgwick Drive**	
Suburb	**Armidale**	
State / Postcode	**NSW**	
Contact Name	**Patrick Crick**	
Contact Phone number (to verify income)		

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

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home	N/A		☑	☐	☐
Investment Property	N/A		☑	☐	☐
	Rental Income $				
Investment Property	N/A		☑	☐	☐
	Rental Income $				
Motor Vehicle	Ford Mustang	45,000	☑	☐	☐
Motor Vehicle	Holden Ute	8,000	☑	☐	☐
Savings Account	Commonwealth Bank (Goalsaver)	65,000	☑	☐	☐
Savings Account	Commonwealth Bank (Everyday)	5,250	☑	☐	☐
Savings Account	Westpac	3,500	☑	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	Household furniture and sundries	18,000	☑	☐	☐
Superannuation	Colonial Mutual	14,462	☑	☐	☐
Superannuation	UniSuper	45,088	☑	☐	☐
Other	HB24 SMSF	315,400	☑	☐	☐
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	N/A							☑ ☐ ☐
Home Loan	N/A							☑ ☐ ☐
Home Loan	N/A							☑ ☐ ☐
Personal Loan								☑ ☐ ☐
Personal Loan								☐ ☐ ☐
Car Loan	westpac	27,247	58,756	1,204/M	60 M	21/07/2023	19/07/2028	☑ ☐ ☐
Car Loan								☐ ☐ ☐
Credit Card	CBA	11,944	12,000	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	☐ ☐ ☐
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	100		175	
Rates	N/A		N/A	Nil rates
Body Corporate	N/A		N/A	Nil body corporate
Ongoing Rent	1,815		1,815	
Transport	130		130	
Car expenses	400		400	
Food / Groceries	980		980	
Communication & Media	95		95	
Medical & Health	50		50	
Education & Childcare	N/A		N/A	Nil education and childcare expenses
Child Support/ Maintenance	N/A		N/A	Nil dependants
Insurance - General	N/A		N/A	Life insurance included in superannuation
Insurance - Health	175		175	
Insurance - Risk	N/A		N/A	
Entertainment & Recreation	460		460	
Clothing & Personal Care	40		40	
Gift/Donations	40		40	
Other	42		42	Homes expenses
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:
2026-06-30 20:09:48 (GMT +1000 Australia/Brisbane)
Completed by:
Jason Peak
Completed Email:
jpeak72@outlook.com
Completed Phone:
+610417160294
Completed ID:
323032362d30362d33302031303a30393a3531-7a790fd7-949b-41a3-a277-e3e587fd902b
Completed IP:
195.86.27.209
Completed Platform:
Win32