Interview: ☐ Face to face ☑ Phone ☐ Voice call

Location: Phone Meeting

Date & Time: 19th September 2026 - 1:20pm

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?

The applicants are First Home Buyers and have purchased a property at
I note they have savings of $290,000 but they do NOT want to use this towards the settlement as it is a "rainy day fund."

Please note our clients have purchased a property and are now seeking a formal approval. The property address is169 East Street South, MOUNT MORGAN QLD 4714. The contract price is $400,000.

Loan Amount sought: $ 400,000		
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	Mrs	Mr
Surname	Pimm	Pimm
Given Name/s	Melissa Jane	Shane Danny
Preferred Name	Melissa	Shane
Previous Name		
Date of Birth (DOB)/ Gender	15/08/1973 /	07/07/1973 /
Marital Status	☐ Single ☑ Married ☐ De facto	☐ Single ☑ Married ☐ De facto
Dependents	# of NIL	# of NIL
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	20 Aldinga Street	20 Aldinga Street
Suburb	Redbank Plains	Redbank Plains
State / Postcode	QLD, 4301	QLD, 4301
Date moved in	June 2015	June 2015
	☐ 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	☐	0439 042 529	0408 709 789
Home Phone	☐		
Work Phone	☐		
Email Address	☐	mel_shane91@hotmail.com	shane_mel91@hotmail.com

ADDITIONAL INFORMATION

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

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	August 2026	June 2026
Occupation	Truck Driver	Driver Trainer
Income Amount (Gross / Net)	$87,360	$103,789
Pay frequency	☑ WK ☐ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☑ M ☐ P/A
EMPLOYER	Pie Hole Smoko Pty Ltd	Team Global Express
Street Address	2 Thompson Avenue	245 Somerset Road
Suburb	Mount Morgan	Gracemere
State / Postcode	QLD, 4714	QLD, 4702
Contact Name		
Contact Phone number (to verify income)		
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	Nov 2023 / August 2026	December 2024 / June 2026
Occupation	Truck Driver	Truck Driver
Income Amount (Gross / Net)	$100,000	$115,000
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Truck Moves Australia	Toll Global
Street Address	Byers Court	
Suburb	Redbank	Wacol
State / Postcode	QLD, 4301	QLD, 4076
Contact Name		
Contact Phone number (to verify income)		

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

Shane Employment - Techforce April 2023 to May 2024
Address: Greenhill Road Eastwood South Australia, 5063.
Truck Driver

Salary $115,000

Shane Employment: November 2022 to April 2023. Workpac
Address: 1305 Lake Orr Drive Varsity Lakes QLD, 4227.

Shane Employment:

ASSETS

Type	**Description**	**Estimated Value**	**Owner** App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle			✔	☐	☐
Motor Vehicle	GU Nissan Patrol 2006	$35,000	☐	✔	☐
Savings Account	ANZ	$40,000	☐	✔	☐
Savings Account	ANZ	$250,000	✔	☐	☐
Savings Account			☐	☐	☐
Savings Account	SMSF	$315,000	☐	☐	✔
Savings Account			☐	✔	☐
Home Contents	Furniture	$50,000	☐	☐	✔
Superannuation			☐	☐	☐
Superannuation			☐	✔	☐
Other	Toyota Prado 2020	$60,000	☐	✔	☐
Other	Harley Davidson V Rod 2015	$40,000	☐	✔	☐

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								☐	☐	☐
Personal Loan								☐	☐	☐
Car Loan								☐	☐	☐
Car Loan								☐	☐	☐
Credit Card	Gem Finance	NIL	$6,000	N/A	N/A	N/A	N/A	☐	✔	☐
Credit Card	ANZ Visa	$1,500	$3,000	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	☐	☐	☐
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	$500	Per Month	$500	
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	$1,083.33	Per Month	$1,083.33	
Transport	$200	Per Month	$200	
Car expenses	$100	Per Month	$100	
Food / Groceries	$800	Per Month	$800	
Communication & Media	$180	Per Month	$180	
Medical & Health		Per Month		
Education & Childcare		Per Month		
Child Support/ Maintenance		Per Month		
Insurance - General		Per Month		
Insurance - Health		Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	$150	Per Month	$150	
Clothing & Personal Care	$150	Per Month	$150	
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				