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Super Property

Client Application Form

General Details

Client 1

First Name
Jamie

Last Name
Jurgeleit

Marital Status
Single

Address
27 Vincent street Baulkham Hills NSW 2153

Date of Birth
28/03/1991

Email Address
Jamiejurgeleit@outlook.com

Phone Number
0421231494

Client 2 (If Applicable)

First Name

Last Name

Marital Status

Address

Date of Birth

Email Address

Phone Number

Are you an Australian Citizen
No, permanent resident (born in New Zealand)

What is your current living status?
Renting

Balance owing on your mortgage? (If Applicable)
N/A

Balance owing on Investment Property (If Applicable)
N/A

Have you ever purchased a home before?
No

Do you qualify for the First Home Owners Grant?
Yes

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)

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Employment Status

Client 1	Client 2 (If Applicable)
Employment Status	**Employment Status**
Full time	
Employment Start Date	**Employment Start Date**
June 2015	
Gross Annual Salary	**Gross Annual Salary**
$129,118.16	
Occupation	**Occupation**
Production manager/ panel beater	
Is any income received from bonuses?	**Is any income received from bonuses?**
Yes, but not included in gross salary	

Financial DetailsPersonal Loan

Personal Loan 1 Lender:	**Personal Loan 2 Lender:**
Commonwealth bank	
Personal Loan 1 Balance:	**Personal Loan 2 Balance:**
$42,989	
Personal Loan 1 Total Amount:	**Personal Loan 2 Total Amount:**
Personal Loan 1 Interest rate/Repayment Amount:	**Personal Loan 2 Interest rate/Repayment Amount:**
Car Loan 1 Lender:	**Car Loan 2 Lender:**
Car Loan 1 Balance:	**Car Loan 2 Balance:**
Car Loan 1 Total Amount:	**Car Loan 2 Total Amount:**
Car Loan 1 Interest Rate/Repayment Amount:	**Car Loan 2 Interest Rate/Repayment Amount:**

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Financial Details

Credit Card 1 Lender:

Zip

Credit Card 1 Balance:

$4950

Credit Card 1 Limit:

$5000

Credit Card 1 Interest Rate/Repayment Amount:

$38pw 13.5%

Credit Card 2 Lender:

Zip

Credit Card 2 Balance:

$2847.54

Credit Card 2 Limit:

$5000

Credit Card 2 Interest Rate/Repayment Amount:

$50pw no interest

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)

Commonwealth bank personal loan

Zip with interest

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Financial Details

Savings and Superannuation

What is you combined superannuation amount?

$202,844.81

How much savings would you like to use?

None if possible

Do you own any shared outside of superannuation?

No

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

300

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?

Up to $500,000

How many bedrooms/ bathrooms do you require?

3 bed 1 bath

What location would you like to build/ buy in?

South Australia

Property Type: Established, construction, new never occupied

Established

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Audit Trail

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