Interview: ☐ Face to face ☑ Phone ☐ Voice call

Location: Castle Hill

Date & Time: After 4:30 most afternoons

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?

To buy a house to live in

Loan Amount sought: $ 500,000 - 600,000		
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	Jurgeleit	
Given Name/s	Jamie Peter	
Preferred Name	Jamie	
Previous Name		
Date of Birth (DOB)/ Gender	28/03/1991 / 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	**27 Vincent Street**	
Suburb	**Baulkham Hills**	
State / Postcode	**2153**	
Date moved in	**July 2020**	
	❒ Owns ☑ Rents ❒ Other	❒ Owns ❒ Rents ❒ Other
PREVIOUS		
Street	**6 Vesuvious Street**	
Suburb	**Seven Hills**	
State / Postcode	**2147**	
Date moved in/out	**june 2019** In **july 2020** Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	**0421231494**	
Home Phone	❒		
Work Phone	❒		
Email Address	❒	**jamiejurgeleit@outlook.com**	

ADDITIONAL INFORMATION

Mother's Maiden Name		
ID document # ***(DL/Passport)***	**QLD Drivers License No. 099849548**	
Foreign Tax Status / TNN		
Town / Country of Birth	**Papakura, New Zealand**	
Estimated Retirement Age	**65**	

RELATIVE NOT LIVING WITH YOU

Name	**Marion Rigby**
Phone	**0400121500**
Email	**romajoru@hotmail.com**
Address	**36 Sundowner Street, Regents Park QLD 4118**

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 2015**	
Occupation	**Workshop Vehicle Repair Production Manager**	
Income Amount (Gross / Net)	**$129,000 PA Gross $1865 PW Net**	
Pay frequency	☑ WK ☐ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	**Repairhub**	
Street Address	**6/8 Anella Avenue**	
Suburb	**Castle Hill**	
State / Postcode	**2154**	
Contact Name	**Andrea Scott**	
Contact Phone number (to verify income)	**0406570875**	
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)?

Monthly Bonus 0-300 not guaranteed

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	**Isuzu Mux**	**$40,000**	☑	☐	☐
Motor Vehicle	**Holden Colorado**	**$15,000**	☑	☐	☐
Savings Account			☐	☐	☐
Savings Account	**Commbank**	**$1000**	☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	**All Contents**	**$10,000**	☑	☐	☐
Superannuation	**SMSF**	**$194,000**	☑	☐	☐
Superannuation	**ART**	**$10,000**	☑	☐	☐
Other	**Other cars, Boat, Caravan, Bikes, Tools**	**$35,000**	☑	☐	☐
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	**Commbank**	**$42,500**	**$42,500**	**$191 PW**	**7 Years**	**05/12/25-05/12/32**		☑ ☐ ☐
Personal Loan								☐ ☐ ☐
Car Loan								☐ ☐ ☐
Car Loan								☐ ☐ ☐
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	**Afterpay**	**$631.25**	**$3000**	**will be paid and closed in 3 weeks**		**will be paid and closed in 3 weeks**		☑ ☐ ☐
Other	**Zip**	**$9800**	**$10,000**	**$100 PW**				☑ ☐ ☐

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	250			
Rates				
Body Corporate				
Ongoing Rent	$2730			Won't be paying rent once I buy a house
Transport	200			fuel, tolls
Car expenses	200			rego, servicing, insurance
Food / Groceries	600			
Communication & Media	120			
Medical & Health	20			
Education & Childcare				
Child Support/ Maintenance				
Insurance - General				
Insurance - Health	110			
Insurance - Risk				
Entertainment & Recreation	200			
Clothing & Personal Care	10			
Gift/Donations				
Other				
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:
2026-05-21 19:20:13 (GMT +1000 Australia/Brisbane)
Completed by:
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Completed Email:
jamiejurgeleit@outlook.com
Completed Phone:
+610421231494
Completed ID:
323032362d30352d32312030393a32303a3137-96d8f15a-1577-4065-a046-c3d754a0dc63
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