Interview:	☐ Face to face	☐ Phone	☑ Voice call
Location:	Home		
Date & Time:	16/04/2026 3:00pm		

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?

Would like to refinance my home loan to:

1.
Consolidate personal loans and credit cards debts:
Brighte PL = $4,877
Lattitude CC = $4,987
Zip Money PL = $1,877
Humm90 CC = $5,497
Plenti PL= $8,037
TOTAL = $25,275

2.
Have a cash surplus of $25,000 (3months safety net)

3. Pay down equity loan if cheaper to long term.

Loan Amount sought: $		
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	Donnelly	
Given Name/s	Pedro James	
Preferred Name	Pedro	
Previous Name		
Date of Birth (DOB)/ Gender	14/05/1987 /	/
Marital Status	☑ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of	# of
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	3 Vassar	
Suburb	Collingwood Park	
State / Postcode	QLD 4301	
Date moved in	August 2025	
	☑ Owns ☐ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	5 Beelong Street	
Suburb	Crestmead	
State / Postcode	QLD 4132	
Date moved in/out	December 2018 In August 2025 Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0421704977	
Home Phone	☐		
Work Phone	☐		
Email Address	☐	pedrodonnelly@live.com.au	

ADDITIONAL INFORMATION

Mother's Maiden Name	Alba	
ID document # ***(DL/Passport)***		
Foreign Tax Status / TNN		
Town / Country of Birth		
Estimated Retirement Age	65	

RELATIVE NOT LIVING WITH YOU — Mother

Name	Julieta
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	26/01/2026	
Occupation	Surveyor	
Income Amount (Gross / Net)	Net: $6,800/fortnight	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Sunrise Surveying	
Street Address		
Suburb	Milton	
State / Postcode	QLD 4064	
Contact Name	Matt Cover	
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	09/01/2023 / 26/01/2025	/
Occupation	Mine Surveyor	
Income Amount (Gross / Net)	Gross $186,000/year	
Pay frequency	☐ WK ☐ F/N ☑ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER		
Street Address		
Suburb	Middlemount Road	
State / Postcode	QLD	
Contact Name	Anglo American Coal	
Contact Phone number (to verify income)		

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

no

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home	4 Bedroom 2 bathroom 2 garage	$940,000.00	✔	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	2022 LDV D90	$34,777	☐	☐	☐
Motor Vehicle			☐	☐	☐
Savings Account	Bankwest	$3,000	☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	Furniture and Appliances	$77,700.00	☐	☐	☐
Superannuation		$277,770.00	☐	☐	☐
Superannuation			☐	☐	☐
Other			☐	☐	☐
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	Bankwest	$739,663.6		$4,550/Month	30years	03/2024		✔	☐	☐
Home Loan								☐	☐	☐
Home Loan								☐	☐	☐
Personal Loan	as above							☐	☐	☐
Personal Loan								☐	☐	☐
Car Loan								☐	☐	☐
Car Loan								☐	☐	☐
Credit Card	As above			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	Per Fortnight	200	
Rates	$100	Per Fortnight	200	
Body Corporate		Per Month		
Ongoing Rent		Per Month		
Transport	$100	Per Fortnight	200	
Car expenses	$100	Per Month	100	
Food / Groceries	$1000	Per Month	100	
Communication & Media	$100	Per Month	100	
Medical & Health	$100	Per Month	100	
Education & Childcare		Per Month		
Child Support/ Maintenance		Per Month		
Insurance - General	$350	Per Month	350	
Insurance - Health		Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	$700	Per Month	700	
Clothing & Personal Care	$200	Per Month	200	
Gift/Donations	$100	Per Month	100	
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL			$2350	