Interview: ☐ Face to face ☑ Phone ☐ Voice call

Location: carnarvon

Date & Time: 08/06/26 @ 8:30 am

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?

purchase a house and debt consolidation

Loan Amount sought: $ 600k - whatever i can get		
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	abreu	
Given Name/s	ashley john	
Preferred Name	ashley	
Previous Name		
Date of Birth (DOB)/ Gender	09/10/1989 / male	/
Marital Status	☐ Single ☑ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 2	# of
Dependents DOB	01/12/2013 23/08/2015	

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	8 geyer place	
Suburb	carnarvon	
State / Postcode	wa 6701	
Date moved in	06/06/2024	
	☐ Owns ☑ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	26 baston street	
Suburb	carnarvon	
State / Postcode	wa 6701	
Date moved in/out	21/082021 In 06/06/2024 Out	In Out
MAILING (if different)		
Street	po box 483	
Suburb	carnarvon	
State / Postcode	wa 6701	

CONTACT DETAILS

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

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	09/12/2019	
Occupation	mechanical fitter	
Income Amount (Gross / Net)	4263.85	
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	watercorporation	
Street Address	84 angelo street	
Suburb	carnarvon	
State / Postcode	wa 6701	
Contact Name	steven ryan	
Contact Phone number (to verify income)	0428372964	
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)?

no

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	2021 Mitsubishi triton	45,000	✔	☐	☐
Motor Vehicle	1999 Landcruiser GXL	8000	✔	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	all housing contents	20,000	☐	☐	✔
Superannuation			☐	☐	☐
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								☐	☐	☐
Home Loan								☐	☐	☐
Home Loan								☐	☐	☐
Personal Loan	commonwealth bank	38,003.97		441	7 years	2/12/24 2/12/31		✔	☐	☐
Personal Loan								☐	☐	☐
Car Loan								☐	☐	☐
Car Loan								☐	☐	☐
Credit Card	commonwealth bank	3666.06	4000	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	zip pay	2000						✔	☐	☐
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	600	Per Month		
Rates	0	Per Month		dont pay rates
Body Corporate	0	Per Month		dont pay any
Ongoing Rent	553	Per Fortnight		
Transport	0	Per Month		dont use transport
Car expenses	200	Per Month		
Food / Groceries	500	Per Fortnight		
Communication & Media	200	Per Month		
Medical & Health	50	Per Month		
Education & Childcare	50	Per Month		
Child Support/ Maintenance	0	Per Month		dont have any
Insurance - General	200	Per Month		
Insurance - Health	100	Per Month		
Insurance - Risk	0	Per Month		dont pay for it
Entertainment & Recreation	350	Per Month		
Clothing & Personal Care	100	Per Month		
Gift/Donations	0	Per Month		dont pay for it
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				