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Interview: ☐ Face to face ☐ Phone ☐ Voice call

Location:

Date & Time:

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 first home

Loan Amount sought: $ 750000		
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	Lehmann	
Given Name/s	Dean Jarrod	
Preferred Name	Dean	
Previous Name		
Date of Birth (DOB)/ Gender	01/06/1982 /	/
Marital Status	☒ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 0	# of
Dependents DOB		

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ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	43 Bainbridge st	
Suburb	Heat	
State / Postcode	4814	
Date moved in	2018	
	☐ Owns ☒ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	41 Ives st	
Suburb	Kirwin	
State / Postcode	4814	
Date moved in/out	2017 In 2018 Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☒	0435 919 073	
Home Phone	☐		
Work Phone	☐		
Email Address	☐	Dlehmann@live.com.au	

ADDITIONAL INFORMATION

Mother's Maiden Name	Trask	
ID document # ***(DL/Passport)***	PB4893968	
Foreign Tax Status / TNN	Australian resident	
Town / Country of Birth	Warracknabeal Australia	
Estimated Retirement Age	65	

RELATIVE NOT LIVING WITH YOU Father

Name	Graham Lehmann
Phone	0408 766 470
Email	
Address	Bowen

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EMPLOYMENT DETAILS (Current)

	Applicant 1	**Applicant 2**
Employment type	[X] PAYG (wage) [ ] Unemployed [ ] Self Employ [ ] Retired	[ ] PAYG (wage) [ ] Unemployed [ ] Self Employ [ ] Retired
Employment basis	[ ] Casual [ ] Part Time [X] Full Time [ ] Contractor	[ ] Casual [ ] Part Time [ ] Full Time [ ] Contractor
Date Started	04/2025	
Occupation	Underground Driller	
Income Amount (Gross / Net)	196000	
Pay frequency	[ ] WK [X] F/N [ ] M [ ] P/A	[ ] WK [ ] F/N [ ] M [ ] P/A
EMPLOYER	MSD MINING SOLUTIONS	
Street Address	37 Mordaunt cct	
Suburb	Canning vale	
State / Postcode	6155	
Contact Name	Brett Manee	
Contact Phone number (to verify income)	08 63237312	
On Probation	[ ] Yes – time left [X] No	[ ] Yes – time left [ ] No

EMPLOYMENT DETAILS (Previous – if less than 3 years in current position)

	Applicant 1	**Applicant 2**
Employment type	[X] PAYG (wage) [ ] Unemployed [ ] Self Employ [ ] Retired	[ ] PAYG (wage) [ ] Unemployed [ ] Self Employ [ ] Retired
Employment basis	[ ] Casual [ ] Part Time [X] Full Time [ ] Contractor	[ ] Casual [ ] Part Time [ ] Full Time [ ] Contractor
Date Started / Finished	2021 / 2023	/
Occupation	Underground supervisor	
Income Amount (Gross / Net)	450000	
Pay frequency	[ ] WK [ ] F/N [X] M [ ] P/A	[ ] WK [ ] F/N [ ] M [ ] P/A
EMPLOYER	AUMS	
Street Address		
Suburb	Burkina faso	
State / Postcode		
Contact Name	Kevin flyn	
Contact Phone number (to verify income)	+226 6666 0425	

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

ASSETS

Type	Description	Estimated Value	Owner App1	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	Toyota hilux		☐	☐	☐
Motor Vehicle	Yamaha yzf450		☐	☐	☐
Savings Account	8000		☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	150000		☐	☐	☐
Superannuation	202000		☐	☐	☐
Superannuation			☐	☐	☐
Other			☐	☐	☐
Other			☐	☐	☐

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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	Toyota finance	66000		500 per fortnight	7	2026 2032		X	☐	☐
Car Loan								☐	☐	☐
Credit Card	Latitude	3000		N/A	N/A	N/A	N/A	X	☐	☐
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:

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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	40	Per Week		Share house
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	160	Per Week		
Transport	100	Per Month		
Car expenses	1000	Per Month		Car loan
Food / Groceries	600	Per Month		Total food
Communication & Media	100	Per Month		Phone
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	1500	Per Month		
Clothing & Personal Care	100	Per Month		
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				