Docusign Envelope ID: 4F185165-46F8-8DB6-8053-2B3AF0359DB4

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?

Loan Amount sought: $ 750,000		
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	O'Sullivan	
Given Name/s	Dean Michael	
Preferred Name	Dean	
Previous Name		
Date of Birth (DOB)/ Gender	13/08/1979 /Male	/
Marital Status	☒ Single ☐ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 2	# of
Dependents DOB	09/04/2013 15/06/2016	

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ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	35 Crest Grove	
Suburb	Nunawading	
State / Postcode	Victoria 3131	
Date moved in	01/11/2024	
	☐ Owns ☒ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	114 Brunel St	
Suburb	Malvern East	
State / Postcode	3145	
Date moved in/out	01/04/2019 In 01/11/2024 Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☒	0451 536 918	
Home Phone	☐		
Work Phone	☐		
Email Address	☒	dmos@outlook.com.au	

ADDITIONAL INFORMATION

Mother's Maiden Name	Hawley	
ID document # ***(DL/Passport)***	DL - 054496738	
Foreign Tax Status / TNN		
Town / Country of Birth	East Melbourne	
Estimated Retirement Age		

RELATIVE NOT LIVING WITH YOU Mother

Name	Debbie O'Sullivan
Phone	0425 852 099
Email	
Address	14 Edna Walling Bvd Woodend Victoria 3442

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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	01/04/2023	
Occupation	Project Manager	
Income Amount (Gross / Net)	$ 2,181.77 - Net P/W	
Pay frequency	[X] WK [ ] F/N [ ] M [ ] P/A	[ ] WK [ ] F/N [ ] M [ ] P/A
EMPLOYER	AVRUS Pty Ltd	
Street Address	Unit 4, 12 Elizabeth St	
Suburb	Hawthorn	
State / Postcode	Victoria 3122	
Contact Name	Shaun Foo	
Contact Phone number (to verify income)	0401 866 533	
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	[ ] 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)		

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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	2019 BMW 320i	$ 20,000	☒	☐	☐
Motor Vehicle			☐	☐	☐
Savings Account	$ 6,000		☒	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	$ 50,000		☒	☐	☐
Superannuation		$ 380,000	☐	☐	☐
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	Commonwealth Bank	5,500	5,600	33 pw				X	☐	☐
Personal Loan								☐	☐	☐
Car Loan	Pepper Finance	$ 24,646.96	50,000	224.54 pw	7 y	June 2022 June 2029		X	☐	☐
Car Loan								☐	☐	☐
Credit Card	Latitude	7,000	10,000	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	300	Per Month		
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	1500	Per Month		
Transport		Per Month		
Car expenses		Per Month		Car expenses are paid for by my employer
Food / Groceries	650	Per Month		
Communication & Media	200	Per Month		
Medical & Health		Per Month		
Education & Childcare		Per Month		
Child Support/ Maintenance	1,516	Per Month		
Insurance - General		Per Month		
Insurance - Health		Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	100	Per Month		
Clothing & Personal Care	100	Per Month		
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				