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 see if we can pay ator off some of the equity loan

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	MS	MR
Surname	Van Dijk	Bowie
Given Name/s	Jessica Jane	Stuart Alan
Preferred Name	Jess	Stu
Previous Name		
Date of Birth (DOB)/ Gender	09/03/1985	13/03/1987
Marital Status	☐ Single ☐ Married ☑ De facto	☐ Single ☐ Married ☑ De facto
Dependents	# of 2	# of 2
Dependents DOB	31/5/22 26/3/20	31/5/22 26/3/20

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	8 Achilpa Ave	8 Achilpa Ave
Suburb	Clifton Springs	Clifton Springs
State / Postcode	3222 VIC	3222 VIC
Date moved in	1/11/2024	1/11/2024
	☑ Owns ☐ Rents ☐ Other	☑ Owns ☐ Rents ☐ Other
PREVIOUS	~~[illegible]~~	
Street	46 Delungra Ave	46 Delungra Ave
Suburb	Clifton Springs	Clifton Springs
State / Postcode	3222 VIC	3222 VIC
Date moved in/out	28/7/23 In 1/11/24 Out	28/7/23 In 1/11/24 Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☐	0401756288	0417305555
Home Phone	☐		
Work Phone	☐		
Email Address	☐	babex@hotmail.com	shantawie13@hotmail.com

ADDITIONAL INFORMATION

Mother's Maiden Name	Riley	Lockwood
ID document # *(DL/Passport)*		
Foreign Tax Status / TNN		
Town / Country of Birth	Geelong	Geelong
Estimated Retirement Age	70	70

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	30/01/2008	
Occupation	Purchasing officer	Forklift driver
Income Amount (Gross / Net)		
Pay frequency	☐ WK ☑ F/N ☐ M ☐ P/A	☑ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Barwon Health	Agmm chelates Pty Ltd
Street Address	Bellerine St	32 Wattlepark Ave
Suburb	Geelong	Moolap
State / Postcode	VIC 3220	VIC 3224
Contact Name		
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	/	/
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)?

ASSETS

Type	Description	Estimated Value	Owner App1	Owner App2	Owner Both
Principal Home			☐	☐	☑
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	Ford Territory 2012	$10,000	☑	☐	☐
Motor Vehicle	Ford Ranger 2007	$10,000	☑	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account	Isaver	$100	☑	☐	☐
Savings Account			☐	☐	☐
Home Contents	Household Furniture, appliances and Jewlery	$30,000	☐	☐	☑
Superannuation			☐	☐	☐
Superannuation			☐	☐	☐
Other	Trailer	$4000	☐	☑	☐
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	430,5758	431811.4	$2773.90	30 YRS	2054	01/8/27	☐	☐	☑
Home Loan								☐	☐	☐
Home Loan								☐	☐	☐
Personal Loan								☐	☐	☐
Personal Loan								☐	☐	☐
Car Loan								☐	☐	☐
Car Loan								☐	☐	☐
Credit Card	NAB		$2000	N/A	N/A	N/A	N/A	☑	☐	☐
Credit Card	NAB		$6000	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	$300	Per Month		
Rates		Per Month		
Body Corporate		Per Month		NA
Ongoing Rent		Per Month		
Transport		Per Month		
Car expenses	$100	Per Month		
Food / Groceries	$800	Per Month		
Communication & Media	$150	Per Month		phone bill
Medical & Health		Per Month		
Education & Childcare	$480	Per Month		
Child Support/ Maintenance		Per Month		
Insurance - General	$362.69	Per Month		car + house
Insurance - Health	$290.30	Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation		Per Month		
Clothing & Personal Care		Per Month		
Gift/Donations		Per Month		
Other House loan	$3572.04	Per Month		
Other Pets	$540	Per Month		
Other		Per Month		
TOTAL	$6535.03			