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Interview: [ ] Face to face [x] 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 a home.

Loan Amount sought: $		
Have you purchased a property / signed a Contract of Sale:	[ ] Yes	[x] No
Are you a First Home Buyer	[x] Yes	[ ] No

PERSONAL DETAILS

	Applicant 1	**Applicant 2**
Title	Mr	Mrs
Surname	Hall	Hall
Given Name/s	Dale Adrian	Josephine Asuque
Preferred Name	N/A	N/A
Previous Name	As Above	Josephine labinsky
Date of Birth (DOB)/ Gender	/	/
Marital Status	[ ] Single [x] Married [ ] De facto	[ ] Single [x] Married [ ] De facto
Dependents	# of 0	# of 0
Dependents DOB		

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ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	7 Patricia Drive	7 Patricia Drive
Suburb	Andergrove	Andergrove
State / Postcode	4740	4740
Date moved in	14/02/2025	14/02/2025
	☐ Owns ☒ Rents ☐ Other	☐ Owns ☒ Rents ☐ Other
PREVIOUS		
Street	20 Wagtail Street	20 Wagtail Street
Suburb	Andergrove	Andergrove
State / Postcode	4740	4740
Date moved in/out	16/04/2024 In 14/02/2025 Out	16/04/2024 In 14/02/2025 Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☒	0432304707	0431269419
Home Phone	☐		
Work Phone	☐		
Email Address	☒	dalehall1970@gmail.com	joyasuque1978@hotmail.com

ADDITIONAL INFORMATION

Mother's Maiden Name	Grey	
ID document # ***(DL/Passport)***	079919356	098801020
Foreign Tax Status / TNN	159082537	817490878
Town / Country of Birth	Wollongong, Australia	Tagbilaran City, Philippines
Estimated Retirement Age	75	65

RELATIVE NOT LIVING WITH YOU Brother

Name	Troy Hall
Phone	0424892160
Email	
Address	6 Embley court, Eagleby

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EMPLOYMENT DETAILS (Current)

	Applicant 1	**Applicant 2**
Employment type	[X] PAYG (wage) [ ] Unemployed [ ] Self Employ [ ] Retired	[X] PAYG (wage) [ ] Unemployed [ ] Self Employ [ ] Retired
Employment basis	[ ] Casual [ ] Part Time [ ] Full Time [ ] Contractor	[ ] Casual [ ] Part Time [ ] Full Time [ ] Contractor
Date Started	01/02/2000	
Occupation	Motor Underwriter	
Income Amount (Gross / Net)	$94000	
Pay frequency	[ ] WK [X] F/N [ ] M [ ] P/A	[X] WK [ ] F/N [ ] M [ ] P/A
EMPLOYER	Auto & General	Goodstart Early Learning
Street Address	9 Sherwood Rd	2-10 Emperor Dr
Suburb	Toowong	Andergrove
State / Postcode	4066	4740
Contact Name	Cristina Dick	Jessica Wellington
Contact Phone number (to verify income)	0437790250	0749550411
On Probation	[ ] Yes – time left [X] No	[ ] Yes – time left [X] 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	N/A		☐	☐	☐
Investment Property	N/A		☐	☐	☐
	Rental Income $				
Investment Property	N/A		☐	☐	☐
	Rental Income $				
Motor Vehicle	2024 GWM Haval GTH6	$44000	☐	☐	X
Motor Vehicle	N/A		☐	☐	☐
Savings Account	6500		☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	60000		☐	☐	☐
Superannuation	$330000		☐	☐	X
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	37000							☐	X	☐
Car Loan								☐	☐	☐
Credit Card	1500			N/A	N/A	N/A	N/A	☐	X	☐
Credit Card	3000			N/A	N/A	N/A	N/A	☐	X	☐
Credit Card	5000			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	☐	☐	☐
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	250	Per Month	250	Electricity
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	3000	Per Month	3000	Rental where in at present
Transport		Per Month		
Car expenses	180	Per Month	180	Petrol
Food / Groceries	800	Per Month	800	
Communication & Media	200	Per Month	200	Foxtel, streaming, internet
Medical & Health	80	Per Month	80	
Education & Childcare		Per Month		
Child Support/ Maintenance		Per Month		
Insurance - General		Per Month		
Insurance - Health		Per Month		
Insurance - Risk		Per Month		
Entertainment & Recreation	50	Per Month	50	
Clothing & Personal Care	50	Per Month	50	
Gift/Donations		Per Month		
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL			4610	