Interview: ☐ Face to face ☑ Phone ☐ Voice call

Location: Gladstone

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?

My objective is to obtain a home loan to purchase a suitable home for myself and my family. I am looking for a long - term home that provides security and meets our current and future needs. I would like to achieve home ownership and have a place to call our own. My needs would be to provide stability, security and a comfortable living environment for myself and my family with my main goal being to establish a stable home for the future.

Loan Amount sought: $ 80%		
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	Walker	
Given Name/s	Brett Anthony	
Preferred Name		
Previous Name		
Date of Birth (DOB)/ Gender	25/12/1972 /	/
Marital Status	☐ Single ☑ Married ☐ De facto	☐ Single ☐ Married ☐ De facto
Dependents	# of 0	# of
Dependents DOB		

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street	33 Dixon Drive	
Suburb	Telina	
State / Postcode	4680	
Date moved in	05/02/2024	
	☐ Owns ☑ Rents ☐ Other	☐ Owns ☐ Rents ☐ Other
PREVIOUS		
Street	24 Briffney Street	
Suburb	Kirkwood	
State / Postcode		
Date moved in/out	1/1/22 In 31/1/2024 Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0447127256	
Home Phone	☐		
Work Phone	☐		
Email Address	☑	brettwalker722@yahoo.com.au	

ADDITIONAL INFORMATION

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

RELATIVE NOT LIVING WITH YOU Sister

Name	Julie Walker
Phone	0400657719
Email	
Address	18 Wirreecoo Avenue Devonport TAS 7310

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	19.05*2008	
Occupation	Supervisor	
Income Amount (Gross / Net)		
Pay frequency	☐ WK ☑ F/N ☑ M ☐ P/A	☐ WK ☐ F/N ☐ M ☐ P/A
EMPLOYER	Gladstone Regional Council	
Street Address	101 Goondoon Street	
Suburb	Gladstone	
State / Postcode	4680	
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	App2	Both
Principal Home			☐	☐	☐
Investment Property			☐	☐	☐
	Rental Income $				
Investment Property			☐	☐	☐
	Rental Income $				
Motor Vehicle	GWM Cannon ute 2022	$30,000	✔	☐	☐
Motor Vehicle	GWM Haval Jolion 2022	$15,000	✔	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents			☐	☐	☐
Superannuation	Hub 24	275,000	✔	☐	☐
Superannuation	Brighter Super	40,000	✔	☐	☐
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								☐	☐	☐
Personal Loan								☐	☐	☐
Car Loan	Power Torque Finance	$28400	$41,832.60	$335 per fortnight	60 months	02/12/2024 - 02/12/2029	YES	✔	☐	☐
Car Loan	Power Torque Finance	$3500	$33,000	$348 per fortnight	60 months	20/2/2022 20/2/2027	YES	✔	☐	☐
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	☐	☐	☐
Credit Card				N/A	N/A	N/A	N/A	☐	☐	☐
After Pay/ Zip Pay	$57.00							☐	☐	☐
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	$100	Per Fortnight		
Rates		Per Month		
Body Corporate		Per Month		
Ongoing Rent	2320	Per Month		
Transport		Per Month		
Car expenses	$50	Per Month		
Food / Groceries	$600	Per Month		
Communication & Media		Per Month		
Medical & Health		Per Month		
Education & Childcare	$0	Per Month		No dependents
Child Support/ Maintenance	$0	Per Month		No dependents
Insurance - General		Per Month		
Insurance - Health	$50	Per Fortnight		
Insurance - Risk		Per Month		
Entertainment & Recreation	$0	Per Month		We rarely go out
Clothing & Personal Care	$50	Per Month		
Gift/Donations	$0	Per Month		No need to
Other		Per Month		
Other		Per Month		
Other		Per Month		
TOTAL				