Interview:	☐ Face to face	☑ Phone	☐ Video call
Location:	WA		
Date & Time:			

NORTH PATH

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?

Client applying for OO property. Leah Smith and Craig Marsh lead name. form has bugs.

Loan Amount sought: $ 700,000				
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		
Surname	Marsh	Marsh
Given Name/s	Leah	Craig
Preferred Name	Leah last name is Smith, document is corrupt and auto populating same last name.	
Previous Name		
Date of Birth (DOB)/ Gender	19/02/75 / Female	23/08/71 / male
Marital Status Single Married		
Dependents	# of 1	# of
Dependents DOB	16 yr old	

ADDRESS DETAILS

CURRENT	**Applicant 1**	**Applicant 2**
Street		
Suburb	Dalyellup	
State / Postcode	WA 6230	
Date moved in		
PREVIOUS		
Street		
Suburb		
State / Postcode		
Date moved in/out	In Out	In Out
MAILING (if different)		
Street		
Suburb		
State / Postcode		

CONTACT DETAILS

	Preferred		
Mobile Phone	☑	0422724966	0437359082
Home Phone	☐		
Work Phone	☐		
Email Address	☑	Goddess75@bigpond.com	Qball380@gmail.com

ADDITIONAL INFORMATION

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

RELATIVE NOT LIVING WITH YOU

Name	
Phone	
Email	
Address	

EMPLOYMENT DETAILS (Current)

	Applicant 1	**Applicant 2**
Employment type	Permanent	Permanent
Employment basis	FT	FT
Date Started	07/04/25	09/01/24
Occupation	Mining	Machine Operator
Income Amount (Gross / Net)	178000	110000
Pay frequency		
EMPLOYER		
Street Address		
Suburb		
State / Postcode		
Contact Name		
Contact Phone number (to verify income)		
On Probation	No	No

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

	Applicant 1	**Applicant 2**
Employment type		
Employment basis		
Date Started		
Occupation		
Income Amount (Gross / Net)		
Pay frequency		
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	Car	25000	☐	✔	☐
Motor Vehicle	Car	15000	✔	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Savings Account			☐	☐	☐
Home Contents	Contents	50000	☐	☐	✔
Superannuation	Super balance	52000	✔	☐	☐
Superannuation	Super balance	232,592	☐	✔	☐
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		20000	170 pw					☐	✔	☐
Personal Loan		3000	120 fn					✔	☐	☐
Car Loan								☐	☐	☐
Car Loan								☐	☐	☐
Credit Card		4500	5000	N/A	N/A	N/A	N/A	✔	☐	☐
Credit Card		4500	5000	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		400	1000					✔	☐	☐
Other	Zipp pay	1500	2000					✔	☐	☐

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	150	pm		
Rates				
Body Corporate				
Ongoing Rent	720	pw		
Transport	90	pw		
Car expenses	1500	pa		
Food / Groceries	150	pw		
Communication & Media				
Medical & Health				
Education & Childcare				
Child Support/ Maintenance				
Insurance - General				
Insurance - Health				
Insurance - Risk				
Entertainment & Recreation	150	pm		
Clothing & Personal Care				
Gift/Donations				
Other				
Other				
Other				
TOTAL				