

DATE	/ /	REFERRER		PHONE	
		CLIENT 1		CLIENT 2	
Given Names		<input type="radio"/> MS <input type="radio"/> MRS <input type="radio"/> MR <input type="radio"/> DR OTHER_____		<input type="radio"/> MS <input type="radio"/> MRS <input type="radio"/> MR <input type="radio"/> DR OTHER_____	
Surname					
Date of Birth					
Drivers License	#	STATE	#	STATE	
Home Address	SINCE? _____		SINCE? _____		
Home Ownership	<input type="radio"/> Renting <input type="radio"/> Own <input type="radio"/> Mortgage <input type="radio"/> Other:		<input type="radio"/> Renting <input type="radio"/> Own <input type="radio"/> Mortgage <input type="radio"/> Other:		
Email					
Mobile					
Home Phone					
Work Phone					
EMPLOYMENT DETAILS					
Employment Type	<input type="radio"/> FT <input type="radio"/> PT <input type="radio"/> CAS <input type="radio"/> CONTRACT <input type="radio"/> SELF		<input type="radio"/> FT <input type="radio"/> PT <input type="radio"/> CAS <input type="radio"/> CONTRACT <input type="radio"/> SELF		
Employment Period	YEARS		YEARS		
Employer Name					
Occupation					
Income		<input type="radio"/> GROSS <input type="radio"/> NET		<input type="radio"/> GROSS <input type="radio"/> NET	
Rental Income					
Other Income					
Marital Status					
Dependants					
Previous Employment (if less than 3 years)	OCCUPATION + TYPE	YEARS	OCCUPATION + TYPE	YEARS	
	OCCUPATION + TYPE	YEARS	OCCUPATION + TYPE	YEARS	
	OCCUPATION + TYPE	YEARS	OCCUPATION + TYPE	YEARS	
Are you aware of any future change of income?	Y/N		IF 'YES', COMMENT BELOW IN 'LOAN PURPOSE AND COMMENTS'		Y/N
NEXT OF KIN			OTHER SERVICES?		
Name / Relationship			<input type="radio"/> Insurance - ideal to ensure your family is protected		
Address / Phone			<input type="radio"/> Deposit Bonds		
Mothers Maiden Name			<input type="radio"/> Credit Report / Depreciation Report		
Loan Purpose and Priorities					
WHAT IS THE PURPOSE OF YOUR LOAN?			WHAT'S IMPORTANT FOR YOU?		
			<input type="radio"/> Stability, repayment habit, budgeting, being able to 'set & forget'. <input type="radio"/> Knowing what's in store for the next few years. Then, reassess. <input type="radio"/> Flexibility, added benefits, a loan that responds to interest rates. <input type="radio"/> Investing and debt consolidation features.		

ASSETS AND LIABILITIES

	Value	Debt Limit	Debt balance	Interest rate	Repayment	Lender
Principal Residence						
Investment Property 1						
Investment Property 2						
Investment Property 3						
Vehicle 1						
Vehicle 2						

Contents:	Value:				
Savings Account	Value:		Lender:		
Transaction Account	Value:		Lender:		
Other Cash/ Savings	Value:		Lender:		
Shares	Value:		Margin loan: Y / N Balance:		
Other Investments	Value:		Value:		
Superannuation	Value:		Value:		
Life Insurance	Value:		Value:		

OTHER EXPENSES / MONTHLY COMMITMENTS

	Lender	Limit	Balance	Comments	
Credit Cards					
Credit Cards					
Store Cards					
Personal Loans					
Monthly Living Expenses	Please include all fixed expenses such as insurances, gym membership and child care To make this easier, you can DOWNLOAD our Budget Form here				
Monthly Rental Expenses		FHOG >	Y / N	LENDER	AMOUNT

Tell Us Your Dreams!
 If we know what you're after, we can help you get it.