Home Loan Profile

Appointment Date: / / Appointment time:	
Name/s:	
Address: Postcode:	
Contact number/s: () () () Preferred method of contact	
Email address:	
Referring Office: Referrer:	
What are your plans? What is the purpose of this finance? Purchase O/O Investment Re-finance Debt Consolidation Are you a First Home Buyer? Yes No Have you found a property yet? Pass - What stage in the purchase are you up to? No - What is your time frame for purchasing a property? Approximate Purchase Price/Property Value SNotes: (existing bank, future requirements, investment, education, renovation, income, market knowledge)	CLIENT SURNAME:

Financial Position

Income and Employment Details:

1. Occupation:	Er	mployer:	100 100 <u>-00 11000 1100</u>				
Annual Salary: \$	Time with er	h employer: Employment type:					
Previous Employer:		Time with employer: Employm			nent type:		
2. Occupation:	Er	mployer:					
Annual Salary: \$	Time with er	mployer:	En	nployment type	:		
Previous Employer:		Time wit	h employer: _	Employn	nent type:		
Family Details: Number of	dependents:	Children	n names and a	ages:			
Financial Commitments							
ASSETS							
Property:							
Property Address		Finance Institution	Loan Value	Monthly Repayment	Property Value	Rental Income	
1.		El Carriero de Mario Carriero Mariano.					
2.				0			
3.							
4.							
Savings/Investments/Other (ie. gifts, furniture etc.): Description			Finance Institution		Value		
IMPORTANT: (If LMI is	required) Do you	have a 3-6 r	nonths savin	g history?			
LIABILITIES							
Credit Cards/Store Cards:							
Card Type	Finance Institu	ution	Limi	t	Outsta	Outstanding	
20	9						
		G.					
Personal Loans/Leases/Hir	e Purchases:						
Type/Purpose	Finance Institu	ution	Amount	Outstandin	ng Balance Mon	thly Repayments	
					1	Á	
Do you have any known credit of	lofaulte?	•					

Loan Features - What's important to you?

Please circle one number in each line. 1 - Most Important, 2 - Indifferent, 3 - Least Important

LOAN TYPE	IMPORTANCE	(Please tick
Variable Interest Rate (Varying Repayments)	O 1 O 2 O 3	
Fixed Interest Rate (Fixed Repayments)	O 1 O 2 O 3	
NOTE: Provide explanation of a locked rate fee.		
Line of Credit/Equity Facility	O 1 O 2 O 3	
Combination or Split Loan (Portion fixed/portion variable)	010203	
REPAYMENTS/COSTS	uker	
Principal and Interest	O ₁ O ₂ O ₃	_
Interest Only	O ₁ O ₂ O ₃	
Ability to make extra payment	O 1 O 2 O 3	
No early repayment penalty fees	O 1 O 2 O 3	
No Account Keeping Fee	O 1 O 2 O 3	
No Application Fee	O 1 O 2 O 3	
LOAN FEATURES		
Offset Account	O 1 O 2 O 3	
Redraw Facility	O 1 O 2 O 3	
Portability	O 1 O 2 O 3	
Repayment Holiday/Parental Leave	O 1 O 2 O 3	
Loan Top Up	O 1 O 2 O 3	
ATM Access	O 1 O 2 O 3	
Internet Banking	O 1 O 2 O 3	
Phone Banking	O 1 O 2 O 3	
Salary Credit	O 1 O 2 O 3	
SUMMARY/CONCLUSION	_	