







# Client - Fact Find

Date:	

PART A - PERSONAL	INFO						
APPLICANT DETAIL	_S:						
APPLICANT 1 - PERSONAL DETAILS			APPLICANT 2 - PERSONAL DETAILS				
Title Full Name	Date of Birt	h		Title Full Name	Date of Birth	ı	
No of Dependants	Marital Sta	tus		No of Dependants	Marital State	us	
Dependants Ages  Drivers Licence Numl  Issue and Expiry Date  Residential Status				Dependants Ages Drivers Licence Num Issue and Expiry Date Residential Status			
APPLICANT 1 - CON	ITACT DETAILS			APPLICANT 2 - COI	NTACT DETAILS		
Current address Street Address Reside	ent of (if not Australia)			Current address  Street Address  Resid	dent of (if not Australia)		
Suburb	te moved to addres:	State	Postcode	Suburb	ate moved to address	State	Postcode
If under 2 years, please pro Previous Address Street Address	vide Previous Address det	ails.		If under 2 years, please pro Previous Address Street Address	ovide Previous Address deta	ils.	
Suburb		State	Postcode	Suburb		State	Postcode
Da	te moved to addres	s		Di	ate moved to address		
Postal address (if different to Mailing Address Street Address	from Current Residential A	Address)		Postal address (if different Mailing Address Street Address	from Current Residential Ad	idress)	
Suburb		State	Postcode	Suburb		State	Postcode
Email Address				Email Address			
Home Phone No		Preferr	ed Contact	Home Phone No		Preferre	ed Contact
Work Phone No		Home		Work Phone No		Home	
Mobile No		Work Mobile		Mobile No		Work Mobile	
Fax No		Email		Fax No		Email	

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## APPLICANT INCOME SOURCES

APPLICANT 1 - EMPLOYME	NT DETAILS	APPLICANT 2 - EMPLOYMENT DETAILS					
Current Employment Status		Current Employment Status					
Occupation	Industry	Occupation	Industry				
Employer/Company Name ar	nd Address	Employer/Company Name a	nd Address				
Street Address		Street Address					
Street Address		Street Address					
Suburb	State Postcode	Suburb	State Postcode				
Employer contact name and phone numb	per (HR/Payroll contact)	Employer contact name and phone num	ber (HR/Payroll contact)				
Employer Email	Estimate Annual income	Employer Email	Estimate Annual income				
Comment Formula manufacture Acceptance	\$	Current Employment Av	/erage Hours pwk (if casual or part time				
Current Employment Av	erage Hours pwk (if casual or part time)	Current Employment Av	rerage Hours pwk (ii Casuai or part time,				
Date Employement Started	Hours	Date Employement Started	Hours				
If Current Employment is less than 6 m	nonths	If Current Employment is less than 6 n	nonths				
Is applicant on probation? No	Yes	Is applicant on probation? No	Yes				
If yes, date probation ends		If yes, date probation ends					
	200000000000000000000000000000000000000						
If employed or in business for less than Previous Employment details.	n 3 years, piease proviae	If employed or in business for less tha Previous Employment details.	n 3 years, piease proviae				
Previous Employment Status		Previous Employment Status					
Occupation I	ndustry	Occupation I	ndustry				
Employer/Company Name an	d Address	Employer/Company Name ar	nd Address				
Chunch Addunce		Chunch Addungs					
Street Address		Street Address					
Suburb	State Postcode	Suburb	State Postcode				
Employer contact name and phone numb	her (HR/Payroll contact)	Employer contact name and phone num	her (HR/Payroll contact)				
	ser (my rayron contact)	2.mproyer contact name and priorie nam	out (invitagion contact)				
Employer Email	Previous Employment	Employer Email	Previous Employment				
Previous Annual income	Date Started Employment	Previous Annual income	Date Started Employment				
\$		\$					
Additional Income		Additional Income					
If you have additional income sources, s eg. Rent, Investments, Second Job, Gove	•	If you have additional income sources, seg. Rent, Investments, Second Job, Gov					
	Annual Income \$		Annual Income \$				
Details of Income		Details of Income					

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#### PART B - FINANCIAL POSITION - ASSETS ONLY

### FINANCIAL POSITION – PAYG APPLICANTS:

The following information will provide a snapshot of the applicant's net worth position for: Applicant 1, 2 or Both

ASSETS:	

TOTAL ASSETS

ASSET TYPE	VALUE OF ASSET	OWNER OF ASSET		
Owner Occupied Home Property Address	\$	Applicant 1 Applicant 2 Or Both		
Investment Property	<b>\$</b>			
Property Address	\$	Applicant 1 Applicant 2 Or Both		
Investment Property Property Address	\$	Applicant 1 Applicant 2 Or Both		
Motor Vehicle  Make, Model and Year	\$	Applicant 1 Applicant 2 Or Both		
Motor Vehicle  Make, Model and Year	\$	Applicant 1 Applicant 2 Or Both		
Motor Vehicle  Make, Model and Year	\$	Applicant 1 Applicant 2 Or Both		
Investments  Shares, Manage Funds, Term Deposits (Account Details)	\$	Applicant 1 Applicant 2 Or Both		
Savings Account  Bank, BSB & Account Number	\$	Applicant 1 Applicant 2 Or Both		
Savings Account  Bank, BSB & Account Number	\$	Applicant 1 Applicant 2 Or Both		
General Contents	\$	Applicant 1 Applicant 2 Or Both		
Other Assets	\$	Applicant 1 Applicant 2 Or Both		
Boats, Caravans, Collections etc				
Superannuation - Applicant 1	\$	Applicant 1 Applicant 2 Or Both		
Superannuation - Applicant 2	\$	Applicant 1 Applicant 2 Or Both		
Other (eg Gifts, Inheritance etc)	– provide details			
	\$	Applicant 1 Applicant 2 Or Both		
	\$	Applicant 1 Applicant 2 Or Both		
	\$	Applicant 1 Applicant 2 Or Both		
	\$	Applicant 1 Applicant 2 Or Both		
	\$	Applicant 1 Applicant 2 Or Both		
TOTAL ASSETS (4)	\$			

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### PART B - FINANCIAL POSITION

### FINANCIAL POSITION – PAYG APPLICANTS:

The following information will provide a snapshot of the applicant's net worth position for: Applicant 1, 2 or Both

#### LIABILITIES:

LIABILITY TYPE	LIMIT	MONTHLY REPAYMENT	AMOUNT OWING		OWNER OF LIABILITY			
Owner Occupied Home	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Investment Property	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Investment Property	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Motor Vehicle Finance	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Car Lease	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Personal Loan	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Personal Loan	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	BSB & Account No		Interest Rate	%				
Credit Card	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	Card No		Interest Rate	%				
Credit Card	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	Card No		Interest Rate	%				
Overdrafts & Other Bank Facilities	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Lender	Card No		Interest Rate	%				
Loans as Guarantor	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Private Loan	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Personal Debt	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Private School & Childcare Fees	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
HECS liability / Taxation debt	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
Other liabilities – provide details								
	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
	\$	\$	\$		Applicant 1 Applicant 2 Or Both			
TOTAL LIABILITIES (B)	\$	\$	\$					

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CREDIT HISTORY:					
Has there ever been or are there now If yes, provide details below.	ı any current Financial Judgement	ts or Legal Proce	eedings against any of the applica	nts?	Yes No
Are you aware of any Current Default If yes, provide details below.	ts or Defaults in the Last 5 years on	n your personal	Credit Report?		Yes No
Are you aware of any late payments If yes, provide details below.	on any liabilites such as Home Loa	ans, Personal Lo	oans (last 6 months) or Credit Card	ls (last 3 months)?	Yes No
Loan Purpose (what are	the intended loan fund	ls for in de	tail?)		
Reference - Nearest Rela	ative (note - this info is	only requi	red with some lenders):		
Name of Relative (not livin			Name of Relative (not live		
Street Address			Street Address		
Suburb	State Po	ostcode	Suburb	S	tate Postcode
PART C - CREDIT ASSISTAI	NCE PROVIDER DETAILS	3			
TART C CREDIT ASSISTAN	NEET NOVIDEN DETAILS	<b>,</b>			
BROKER DETAILS:					
Broker Full Name Pauline	Sultana Compa	ny Pride	Mortgage Services	ACN	111 777 023
Authorised Credit Represent	399437	Of Aust	ralian Credit Licence Hold	er BLSSA PTY LT	D - Licence No 391237
Qualifications Diploma of F	Financial Services (Finance an	nd Mortgage E	Broking Management) AF	CA Member No	49295
Certificate IV Financial Services (Finance and Mortgage Broking)  MFAA Member No 2765					
BROKER CONTACT DETA	ILS:				
Street Address			Dlago - N-	02 4777 5536	
31 Ladbury Avenue			Phone No	0404 852 740	
Suburb	State Po	ostcode	Mobile No Fax No	02 4777 5516	
PENRITH	NSW 2	2750	Email Address		ortgageservices.com.au