

Personal Details

Please complete this form and return to: info@eurekalg.com.au

Applicant 1		Applicant 2	
Name:		Name:	
Address Line 1:		Address:	
Address Line 2:		Same as applicant 1 (Y/N)	
Phone:		Phone:	
Mobile:		Mobile:	
Email:		Email:	
Matril Status: (Single, Married, Defacto)		Matril Status: (Single, Married, Defacto)	
Dependant(s) & age(s):		Dependant(s) & age(s):	

Employment & Income

Applicant 1		Applicant 2	
Current Employer:	Start .../.../...	Current Employer:	Start .../.../...
Prev. Employer (if less than 3 years)	Start .../.../...	Prev. Employer (if less than 3 years)	Start .../.../...
Empoyment: (F/T, P/T, Cas, Mat Leave)		Employment: (F/T, P/T, Cas, Mat Leave)	
Income (gross): W, F/N, M. A.		Income (gross): W, F/N, M. A.	
Other Income (eg: Shares, Interest, Rental)		Other Income (eg: Shares, Interest, Rental)	

Personal Needs

Specific items you are wanting to finance into this review. Eg - Renovations, Solar, Water tanks, New furniture, Buying a car, Holiday. Please list below.

Client Review

Personal Financial Position - Assets (What you own)

Property Assests			
<u>Applicant 1 & 2</u>			
<u>Address details</u>		Joint/App 1/ App 2	Cash Value
1			
2			
3			
		Sub Total 1:	

<u>Personal Savings</u>			
<u>Cash Funds</u>			
Financial Institution	Type of Account	Joint/App 1/ App 2	Cash Value
1			
2			
3			
		Sub Total 2:	

<u>Other Investments</u>			
Shares, Bonds, Managed Funds, Superannuation, Life Insurance		Joint/App 1/ App 2	Cash Value
		Sub Total 3:	

<u>Motor Vehicles</u>			
Provide estimated market values as at date of enquiry & rego if required by proposed lender			
Make & Model	Year	Joint/App 1/ App 2	Cash Value
1			
2			
3			
4			
Equipment ie. Boat, Tools trailer etc.			
1			
2			
		Sub Total 4:	

<u>Personal Assets</u>			
Contents, (insured value), Business Assets, Personal Effects (Antiques/High value items)			
<u>Details</u>	Joint/App 1/ App 2		Cash Value
		Sub Total 5:	
		Joint Total Assets:	

Personal Financial Position - Liabilities (What you owe)

List all liabilities and indicate whether: 1. Joint/Individual borrowers 2. Any guarantors 3. Residential/Investment. Be sure to indicate whether borrowers are on both the title and mortgage.

Liabilities: (What you owe)

Loan Type	Min. R/Pmnts	Current Balance/Limit	Is Loan Fxd. Or. Var.	Int. Rate	Bank/Institution
Home Loan - P&I			V / F		
Invest. Loan - P&I or Int.Only			V / F		
Line of Credit - Other			V / F		
Total Mortgages 1.					
Other Loans	(Note: Indicate minimum repayments by lender)				
Lease/Hire Purchases			V / F		
Personal Loan/s			V / F		
Other Loans - (give details)			V / F		
Total Personal 2.					
Total Balance Owed:					

Other Credit Limits/Balances:

Credit Cards	Min. Payments	Current Balance	Limit/s	Card Type	Bank/Intsitution
Credit Card					
Credit Card					
Credit Card					
Afterpay/Zip/OpenPay					
Interest Free Loans					
Other - HECS, Tax, etc.					
Totals					

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Has there been any legal action taken against you for default of any credit contract you have held within the last 5 years?	Y / N
Have you or any company you have been a director of, ever had any judgements instituted against you, been bankrupt, insolvent or had terms of assignments with you creditors?	Y / N
Have you made an application to any other lender or institution for any loan/s within the past 3 months?	Y / N
Have you been declined finance by any other Lender or institution within the past 3 months?	Y / N
Have any defaults been lodged against you for non payment of any credit within the past 5 years?	Y / N

If answered "Yes" to any of the above, please provide details:
