

FINANCIAL FACT FIND

Please complete and email to steve@eliteloanservices.com.au

		RSONAL & EN								
		Individual Applicant 1				Individual Applicant 2				
Currence		iliulviduai Applicant 1			•	maividuai Applicant 2				
Surname Given Names										
Date of Birth										
Email										
Lillali										
Home Address										
		Time at address	yrs	mth		Time at add	lress	yrs	mth:	
Previous home address i yrs	f less than 3									
		Time at address yrs mth				Time at address yrs mth				
Phone Numbers		Work:				Work:				
Email Address		Home:				Home:				
<u> </u>		Mobile:				Mobile:				
Marital Status: cross out		Married Single De facto				Married Single De facto				
		No of Dependants & Ages				Eligible for FHOG? Y/N				
Employment:		F/T, P/T, Casual, S/Emp Yrs Mths			5	F/T, P/T, Casual, Yrs S/Emp Mths				
Self Employed		ABN				Are 2yrs financials available? Y / N				
Annual Gross Salary OR		GST Date/_ \$	/	_						
Annual Self Employed Income		Currency:				\$ Currency:				
Any other Income or Benefits – Taxed or Untaxed (please detail) Family Payments A&B		\$				\$				
Employer Name and Add years include your role	ress cover 3									
ASSETS	Value	LIABI	LITIES			/lonthly	Loan Limit		Amount	
O/O Home	\$	Mortgage with:			\$	ayments	\$	\$	Owing	
		Rental	Mortgage v	vith:						
Other Property	\$	Inc.p/w: \$	Wiortgage v	VILII.	\$		\$	\$		
Other Property	\$	Rental Inc.p/w:\$	Mortgage v	vith:	\$		\$	\$		
Motor Vehicles		, ,								
Make	\$	Car Loans with:			\$		\$	\$		
Yr										
Cash at Bank	\$	Personal Loans with:			\$		\$	\$		
Personal Effects	\$	Total Credit Card Limits:			\$		\$	\$		
Superannuation \$		Any Other Loans:			\$		\$	\$		
Other Assets	\$	Child Maintenance	Payments:		\$		\$	\$		
TOTALS \$					\$		\$	\$		
If currently renting, how	long?	Term:	Yrs	\$		per	week			
Loan Amount Required: \$				Term:		Yrs	N	1ths	-	
Security Offered:					-					

Cost of living: please provide a cost of living per month to cover:
Primary Residence \$ includes home maintenance and repairs, electricity, gas, water, Gardens, council rates housekeeper
Phone, internet & Media \$ includes landline, internet, mobile phone, subscription services E>G> Foxtel, Netflix etc
Food & Groceries \$ includes groceries, cigarettes, alcohol, restaurants, cafes, takeaway and delivery
Recreation & Holidays \$ includes lifestyle and culture, newspapers, magazines, books, sports, hobbies, memberships (gym etc) gifts, holidays and airfares, donations
Clothing & Personal \$ includes clothes & Shoes, hair & Beauty
Medical & Health \$ includes doctor, pharmacy, dentist, optical, physio, remedial, chiro, alternative therapies
Transport \$ Includes registration, fuel, maintenance, roadside assist, parking & Tolls, public transport, taxi, rentals
Education \$ Includes public, private, HECs, professional development, books, uniforms excursions
Childcare \$ Includes childcare, babysitting
General Insurance \$ Includes income protection, home & contents, vehicle, travel
Investment Property costs \$ Includes maintenance, taxes, levies, body corporate, strata fees, repairs household items, insurance, rates, property management, utilities
any other costs \$
Cost of Living: \$ per month Your Requirements and Objectives:
What is important to you now?
What is important to you in 10 years time?
Comments:

It is important we get an understanding of your particular financial commitments, please list below as close as possible your

normal living expenses