

# Client Fact Find Form

## LOAN DETAILS

Loan Purpose	Property Use (Owner Occ/Investment)
Loan Amount Requested	Purchase Price
Current Property Value	Current Loan Balance
Current Lender	Loan Term (years)

## APPLICANT 1

First Name	Last Name	
Date of Birth	Mobile Phone	
Email Address		
Street Address		
Suburb	State	Postcode
Employer	Job Title	
Gross Annual Income	Years Employed	

## APPLICANT 2 (if applicable)

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First Name

Last Name

Date of Birth

Mobile Phone

Email Address

Employer

Job Title

Gross Annual Income

## ASSETS

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Asset 1 Type

Asset 1 Value

Asset 2 Type

Asset 2 Value

## LIABILITIES

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Liability 1 Type

Balance

Monthly Repayment

Liability 2 Type

Balance

Monthly Repayment

## NOTES

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