©

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**Preliminary Fact Find**

**Client’s full name/ s Referrer**

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Notes/ reasons for consultation (Use insert key to type on dotted line)

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|  |  |
| --- | --- |
| Amount Applying For | Address or Description |
|  |  |
|  |  |

(Double click on box or tick)

□Owner occupied □Investment □Refinance □Commercial □Debt consolidation □First home buyer □Special needs □Asset finance

**Personal Details of Applicants and Guarantors**

Applicant (Please include a copy of your Licence)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Given Names | Family Name | DOB | Phone number | Licence # and state acquired | Email |
|  |  |  |  |  |  |
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Do you have any dependent children?

|  |  |  |  |
| --- | --- | --- | --- |
| Dependent’s Name | Dependent’s  Family Name | AGE | Notes |
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**Addresses**

Lenders will require applicant’s last 3yrs of addresses for identification purposes

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| --- | --- | --- | --- |
| Name | Address | Date From | Date To |
|  |  |  | (current) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Occupation**

□FT □PT □Casual □Self Employed□ Director

|  |  |  |
| --- | --- | --- |
| Employer | Business Address & PH | Income |
|  |  |  |
|  |  |  |
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Employment History (Min 3yrs)

Name of business, address, business contact details (the lender will call to check validity)

|  |  |
| --- | --- |
| **1** | (Date commenced and finished) |
| **2** | (Date commenced and finished) |
| **3** | (Date commenced and finished) |
| **4** | (Date commenced and finished) |

**Assets**

Property

|  |  |  |  |
| --- | --- | --- | --- |
| Address/ Type | Owned By | Value | Income $ produced (investment) |
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Machinery/ Equipment/ Vehicles/ house hold items

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Description | Year | Owned By | Hours/ KM | Value | Encumbered Y/N | Income $ produced (investment) |
|  |  |  |  |  |  |  |
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**ADDITIONAL NOTES:**

Savings

|  |  |  |
| --- | --- | --- |
| Institution and name of account | Owner | Value $ |
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Other Assets (investments, house hold assets, stocks, funds, businesses)

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| --- | --- | --- | --- |
| Details- Make, type, model, name of fund etc) | Owner | Income $ | Value $ |
|  |  |  |  |
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**Liabilities**

Credit Cards

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Institution and name of account | Rate % | Owner | Repayments | Limit | Outstanding |
|  |  |  |  |  |  |
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Loans: (Property loans that were included above, personal loans, car loans and any other debts)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Details of loan, what is it for? Property address, Institution | Owner | Rate % | Repayments | Outstanding |
|  |  |  |  |  |
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Living Expenses/ Bills any other ongoing costs (business expenses if applicable)

|  |  |  |
| --- | --- | --- |
| **Details** | **Owner** | **Cost and frequency $** |
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Please feel free to download our interactive budget <http://www.rocksolidfinancialservices.com.au>

Other Incomes or Costs

|  |  |  |
| --- | --- | --- |
| Details | Owner | Amount and frequency $ |
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NOTES- Is there anything else we need to know about your financial situation. How is your credit history?

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