

Client information form



Date: ___ / ___ / ___

personal details

client 1

client 2

Title	mr / mrs / ms / miss / other	mr / mrs / ms / miss / other
Surname		
Given Names		
Date of Birth		
Home Address		
Year moved in		
Living Status	renting \$ pw	renting \$ pw
Phone (Home)		
Phone (Mobile)		
Phone (Work)		
Email Address		
Marital Status	single / married / divorced / de facto/ separated / widowed / life partner	single / married / divorced / de facto/ separated / widowed / life partner
Type of employment	full time / part time / casual / self employed	full time / part time / casual / self employed
Position/Occupation		
Employer		
Date started		
Employer contact number		
Employer Name		
Taxable income	\$ annually	\$ annually
Less salary sacrifice	to:	to:
Additional income		
Family benefits (don't include Rent Assistance)		
Age of dependants		
Best contact person	Client 1 / Client 2 / Both	Best time: am / pm

Client information form



self-employed business details

client 1

client 2

Trading Entity	sole trader / trust / partnership / company	sole trader / trust / partnership / company
Applicant Role	owner-partner / director / corporate trustee / personal trustee	owner-partner / director / corporate trustee / personal trustee
Entity Name		
Trading Name		
ACN/ABN		
Start Date		
Does the business have borrowings (loans, leases)?		

Client current status

assets & liabilities

	value	amount owing	repayment	lender	income
Home contents	\$	\$	\$		
Motor Vehicle 1	\$	\$	\$		
Motor Vehicle 2	\$	\$	\$		
Other	\$	\$	\$		
Credit Card 1 (limit)	\$	\$	\$		
Credit Card 2 (limit)	\$	\$	\$		
Credit Card 3 (limit)	\$	\$	\$		
Credit Card 4 (limit)	\$	\$	\$		
Store Card	\$	\$	\$		
Personal Loans	\$	\$	\$		
Overdraft / Business loans	\$	\$	\$		
Cash / Savings Account	\$	\$	\$		
Superannuation	\$	\$	\$		
Child Maintenance	\$	\$	\$		

household expenses

To assist us to calculate your borrowing capacity, please estimate the amount you spend on the below items and circle the frequency.

item	amount per (please circle frequency)	
food / housekeeping	\$	W / F / M / Y
electricity, water & rates	\$	W / F / M / Y
rent / home loan	\$	W / F / M / Y
motor vehicle/s	\$	W / F / M / Y
insurance	\$	W / F / M / Y
school / child care fees	\$	W / F / M / Y
miscellaneous	\$	W / F / M / Y

Goals – Short and Long Term

Short term goals

ie. Mortgage reduction, tax savings investment



Medium term goals (5-10 years)

ie. Children's education, new car, renovation



Long term goals (10 years onwards)

ie. Retirement income, have home paid off, holiday



Have you got anything in place at the moment to achieve these goals?

Yes / No

Is this an area you would like assistance with?

Yes / No