

YOUR CURRENT POSITION (FIRST HOME BUYER)

Client 1:	Age:	Ages of Children:	No. of Children under 17:
Street Address:		Home Phone:	Mobile Phone:
Email Address:	Occupation & Employer:		Years Employed:
PAYG Gross Income		If Self Employed – Are Tax Returns lodged?	
Full Time:	Part Time:	Casual:	\$
2018 Taxable Income		2019 Taxable Income	
\$		\$	

Client 2:	Age:	No. of Children under 17:	Mobile Phone:
Email Address:		Occupation & Employer:	Years Employed:
PAYG Gross Income		If Self Employed – Are Tax Returns lodged?	
Full Time:	Part Time:	Casual:	\$
2018 Taxable Income		2019 Taxable Income	
\$		\$	

What You Own	Value	Institution / Bank	What You Owe	
			Min Mth Repayments	Amount Owng

Savings/Cash	\$			
Shares	\$		\$	\$
Credit Card	Limit \$		\$	\$
Credit Card	Limit \$		\$	\$
Credit Card	Limit \$		\$	\$
Other Loans e.g. o/draft	\$		\$	\$
Child Maintenance (Amount Per Month) \$			\$	

Yes, I want to build to get “Home Builder’s Grant’ (\$25,000).

Yes, I am a First Home Buyer to get an extra \$15,000.

Suburbs where I would like to live:

Approx. Budget? \$

YES NO I have a broker that I use at the moment.

Preferred Home Features and Requirements

No. of Bedrooms:

- | | | | |
|------------------|----------|--------------------------|--------------------------|
| 1 Bath | 2 Bath | 3 Bath | Others (please specify): |
| 1 Garage | 2 Garage | Others (please specify): | |
| 2-Storey House | | Single Level House | |
| Ensuite | | Balcony/Deck | |
| Built in Robes | | Study Room | |
| Dishwasher | | Hot Water System | |
| Internal Laundry | | Air Conditioning | |
| Solar Panels | | Outdoor Area/Alfresco | |

Any other special requirements: