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FACT FINDER



OFFICE USE	
Referred by:	
Property Inspection:	
Date:	

Personal Details

	<i>Client</i>	<i>Partner</i>
Name	Mr / Mrs / Miss / Ms _____	Mr / Mrs / Miss / Ms _____
Preferred Name (Salutation)	_____	_____
Address	No. & Street: Suburb: Postcode:	No & Street: Suburb: Postcode:
Contact Details		
Home Telephone:		
Home Fax:		
Mobile:		
Work Telephone:		
Work Fax:		
E-mail Address:		
Preferred Contact: (Please Circle)	Home / Work / E-mail / Mobile	Home / Work / E-mail / Mobile

Employment Type (Full time, part time, casual, self employed, contract)		
Occupation		
Income (per annum)		
Time in Current Employment		
Lump Sum due next 12 months? (Redundancy pay-outs, inheritance etc.)		
Current Superannuation Balance		
Do you have a Self Managed Super Fund?		

Over and above your monthly expenses for the next 12 months, will you have any major expenditure commitments? If so, please specify:

Description	\$

Expenses:

Credit Cards etc.	Limit	Bank

<i>Marital Status</i>		
<i>D.O.B.</i>		

<i>Dependents ages:</i>	
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Renting:

<i>Weekly rent:</i>		\$
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Assets & Liabilities...

<i>Assets</i>	<i>Year Purchased</i>	<i>Estimated Current Value</i>	<i>Current Loan Amount</i>	<i>Monthly Repayment</i>	<i>Equity (Value - loan)</i>	<i>Lender</i>	<i>Suburb</i>	<i>Weekly rental</i>
Home		\$						
Holiday Home		\$						
Investment Property 1.		\$						
Investment Property 2.		\$						
Share Portfolio		\$						
Managed Funds		\$						
Cash		\$						
Other Investments (Bonds, Olive Plantation etc.)		\$						

Insurance...

<i>Current Insurance</i>	<i>Amount of Cover Client</i>	<i>Amount of Cover Partner</i>
Term - Life	\$	\$
TPD (Total & Permanent Disability)	\$	\$
Trauma	\$	\$
Income protection	\$	\$

Are you are smoker		
Do you have any Medical Problems		

What are your "Financial" goals?

Short Term:

(eg. To pay off credit cards by December, buy 1 investment property by next March)

1.

2.

Long Term:

(eg. Retire on a passive income of \$50,000 per annum when I am 60yo / 15 years)

1.

2.

What are your personal interests/hobbies?

(eg. Snow skiing, reading, bush walking, playing golf etc.)

Availability of deposit:

Line of credit	\$
Term deposit	\$
Cash	\$

Current service Providers:

Financier	
Accountant	
Solicitor / Conveyancer	
Insurance Broker	
Quantity Surveyor	

Property Criteria - yes

1.

2.

3.

4.

5.

Property Criteria - no

1.
2.
3.
4.
5.
Use this page for additional Investment Properties...

Assets & Liabilities...

<i>Assets</i>	<i>Year Purchased</i>	<i>Estimated Current Value</i>	<i>Current Loan Amount</i>	<i>Monthly Repayment</i>	<i>Equity (Value - loan)</i>	<i>Lender</i>	<i>Weekly rental</i>
Investment Property 3.		\$					
Investment Property 4.		\$					
Investment Property 5.		\$					
Investment Property 6.		\$					
Investment Property 7.		\$					
Investment Property 8.		\$					
Investment Property 9.		\$					
Investment Property 10.		\$					

Information provided to mCorp Investments Pty Ltd, and mCorp Financial Solutions will be kept strictly confidential and not passed onto third party (outside persons or Companies from the mCorp Group of Companies) without my express permission.

Signed: _____