

# CLIENT ASSESSMENT FORM



|   |                      |   |                      |
|---|----------------------|---|----------------------|
| <b>CLIENT 1:</b>  |                      | <b>CLIENT 2:</b>  |                      |
| <b>Address:</b>   |                      | <b>Address:</b>   |                      |
| <b>Suburb :</b>   |                      | <b>Suburb :</b>   |                      |
| <b>Postcode :</b>   | <b>D.O.B :</b>       | <b>Postcode :</b>   | <b>D.O.B :</b>       |
| <b>Home Ph:</b>   |                      | <b>Home Ph:</b>   |                      |
| <b>Mobile Ph:</b>   |                      | <b>Mobile Ph:</b>   |                      |
| <b>Email:</b>   |                      | <b>Email:</b>   |                      |
| Period in Residence:  |                      | Period in Residence:  |                      |
| Occupation:   |                      | Occupation:   |                      |
| Employer:   |                      | Employer:   |                      |
| Length of Employment:                      YRS                      MTHS        |                      | Length of Employment:                      YRS                      MTHS        |                      |
| If less than 2yrs prev emp :                      YRS                      MTHS |                      | If less than 2yrs prev emp :                      YRS                      MTHS |                      |
| Gross Taxable Income: \$  |                      | Gross Taxable Income: \$  |                      |
| Self-employed: Y / N  | If Y - Nett :        | Self-employed: Y / N  | If Y – Nett :        |
| ABN: Y / N  | Date Registered: / / | ABN: Y / N  | Date Registered: / / |
| GST: Y / N  | Date Registered: / / | GST: Y / N  | Date Registered: / / |
| No. of Dependents:  | Ages:                | No. of Dependents:  | Ages:                |
| Family Allowance:   |                      | Family Allowance:   |                      |

| ASSET                    | VALUE |   |                     |
|--------------------------|-------|---|---------------------|
| House                    | \$    | Date Purchased: / /   | Original Price: \$  |
| Other Property 1.        | \$    | Rent Received 1: \$   | Date Purchased: / / |
| Other Property 2.        | \$    | Rent Received 2: \$   | Date Purchased: / / |
| Other Property 3.        | \$    | Rent Received 3: \$   | Date Purchased: / / |
| Shares                   | \$    | <b>Please list actual address of Current Investment Properties:</b>                     |                     |
| Savings                  | \$    | <i>(can you please note who is listed on each title if someone other than yourself)</i> |                     |
| Car (s)                  | \$    | Property 1:   |                     |
| Other                    | \$    | Property 2:   |                     |
| Superannuation           | \$    | Property 3:   |                     |
| Name of Super provider : |       | Are you interested in SMSF :  | Y / N               |

Develop Holdings & Investments Pty Ltd : ABN 31 166 782 609

2/36 Cavill Avenue Surfers Paradise QLD 4217 | p 07 5570 6417w: [www.dhinvestments.com.au](http://www.dhinvestments.com.au)

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| LIABILITIES       | LOAN<br>AMOUNT | LENDER | CREDIT LIMIT<br><small>(card limit, not current bal)</small> | REPAYMENTS    | INTEREST<br>RATE |
|-------------------|----------------|--------|--|---------------|------------------|
| Home Mortgage     | \$             |        | \$   | \$ mthly/wkly | %                |
| Investment Loan 1 | \$             |        | \$   | \$ mthly/wkly | %                |
| Investment Loan 2 | \$             |        | \$   | \$ mthly/wkly | %                |
| Investment Loan 3 | \$             |        | \$   | \$ mthly/wkly | %                |
| Credit Card 1     | \$             |        | \$   | \$ mthly/wkly | %                |
| Credit Card 1     | \$             |        | \$   | \$ mthly/wkly | %                |
| Store Accounts    | \$             |        | \$   | \$ mthly/wkly | %                |
| Vehicle Finance   | \$             |        | \$   | \$ mthly/wkly | %                |
| Overdraft         | \$             |        | \$   | \$ mthly/wkly | %                |
| Other             | \$             |        | \$   | \$ mthly/wkly | %                |

I/ We authorise release of the information contained herein to Develop Holdings & Investments Pty Ltd and their affiliates to \*assess and provide advice regarding finance and property investment provided that such information is treated as confidential and restricted to Develop Holdings & Investments Pty Ltd and their affiliates only.

Client 1 Date: / /

Client 2 Date: / /

Consultant Date: / /

\$  
Comfortable Weekly Contribution Range

**\*Please Note: This is NOT an Application for Finance**

Office use only :

(1) INITIAL CONSULTATION VISIT : Date : \_\_\_\_ / \_\_\_\_ / 20 \_\_\_\_ Time : \_\_\_\_

(2) SENIOR CONSULTANT VISIT : Date : \_\_\_\_ / \_\_\_\_ / 20 \_\_\_\_ Time : \_\_\_\_

(3) LAND AND PROPERTY INSPECTION : Date : \_\_\_\_ / \_\_\_\_ / 20 \_\_\_\_ Time : \_\_\_\_

NOTES : \_\_\_\_\_

CC ☐ EVENTS ☐ PROMO ☐ SMSF ☐ REF ☐ CH ☐

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