

Your Personal Information

The following information will assist in gaining a brief overview of your current situation. Please enter your details and information below and email to us prior to our meeting.

Date:

How did you hear about Soliman Finance?

Your Requirements and Objectives

What are your main reasons for wanting your loan?

Amount of loan sought: Term of credit sought: years

| Preferred Loan Features | Yes | No | Not Essential |
|---|--------------------------|--------------------------|--------------------------|
| Pay off quickly / Additional payments It is important that the loan is paid off quickly and that additional payments are allowed. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to split loan It is important to have more than one loan sub account/s. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Construction It is important to have funds available to build or renovate a property. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Redraw Facility It is important to have access to any additional payments that have been made. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Offset Facility It is important to be able to use a separate account to help reduce costs. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Line of Credit It is important to have a revolving facility that allows you to draw to a limit via EFTPOS, ATM, Internet or Cheque. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to switch loans It is important to be able to move between fixed & variable & interest only & principal & Interest. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Portability / Transportable It is important to be able to change the security of the loan. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other features sought | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Additional information comments:



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Applicant 1 Information

Full Name:

Preferred First Name:

Gender: Date of Birth:

Address: Postcode:

Home Phone: Mobile Phone: Marital Status:

Email:

Time at Current Address: Years Months Citizenship:

Current Residential Status:

of Dependents: Ages:

Applicant 1 PAYG Employment

Employment Type: Start Date:

Occupation: Employer:

Address of Employer: Postcode:

Employer Contact Name: Contact Phone Number:

Employer Email Address: Average Hours per week:

Previous Employment (If current employment less than 2 years)

Employment Type: Start Date:

Occupation: Employer:

Address of Employer: Post Code:

Employer Contact Name: Contact Phone Number:

Employer Email Address: Average Hours per week:

Applicant 2 Information

Full Name:

Preferred First Name:

Gender: Date of Birth:

Address: Postcode:

Home Phone: Mobile Phone: Marital Status:

Email:

Time at Current Address: Years Months Citizenship:

Current Residential Status:

of Dependents: Ages:

Applicant 2 PAYG Employment

Employment Type: Start Date:

Occupation: Employer:

Address of Employer: Postcode:

Employer Contact Name: Contact Phone Number:

Employer Email Address: Average Hours per week:

Previous Employment (If current employment less than 2 years)

Employment Type: Start Date:

Occupation: Employer:

Address of Employer: Post Code:

Employer Contact Name: Contact Phone Number:

Employer Email Address: Average Hours per week:

Applicant 1 Income Information

1. If a PAYG employee, from your last 2 consecutive Pay Slips:

| | Payslip 1 | Year to Date | Payslip 2 | Year to Date |
|------------|----------------------|----------------------|----------------------|----------------------|
| Frequency: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Gross Pay: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Bonus: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Overtime: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Commision: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

2. If Self Employed as:

Sole Trader Partnership Company

From your ATO Notice of Assessment:

Your Taxable Income June

Your Taxable Income June

Are your tax returns available?

Are you Registered for GST?

Occupation: Start Date:

Business Name: ABN:

Contact Name: Contact Phone Number:

Business Address: Postcode:

3. Other Income & Government Benefits

Applicant 1 Information

| Description: | Gross Amount: | Frequency: |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Applicant 2 Income Information

1. If a PAYG employee, from your last 2 consecutive Pay Slips:

| | Payslip 1 | Year to Date | Payslip 2 | Year to Date |
|------------|----------------------|----------------------|----------------------|----------------------|
| Frequency: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Gross Pay: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Bonus: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Overtime: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Commision: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

2. If Self Employed as:

Sole Trader Partnership Company

From your ATO Notice of Assessment:

Your Taxable Income June

Your Taxable Income June

Are your tax returns available?

Are you Registered for GST?

Occupation: Start Date:

Business Name: ABN:

Contact Name: Contact Phone Number:

Business Address: Postcode:

Applicant 2 Information

| Description: | Gross Amount: | Frequency: |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |



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Real Estate

| Address: | Estimated Value: | Rent (pw): | Ownership % | |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| | | | Applicant 1: | Applicant 2: |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Savings Accounts & Investments

| Institution: | Amount: | Ownership % | |
|----------------------|----------------------|----------------------|----------------------|
| | | Applicant 1: | Applicant 2: |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Your Assets - What you own

| Asset Description: | Est. Value: | Ownership % | |
|----------------------|----------------------|----------------------|----------------------|
| | | Applicant 1: | Applicant 2: |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
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| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Security Information

What is the address of the property being used as security?:

What is the estimated value of the property being used as security?:

Contact Information for valuation if required:

Liabilities - What you owe

Loans and Debts

| Type: | Lender: | Limit: | Balance: | Repayment Amounts: | Payment Frequency: | Interest Rate % |
|-------|---------|--------|----------|--------------------|--------------------|-----------------|
| | | | | | | |
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| | | | | | | |

Estimated Monthly Living Expenses

| | | | | | | |
|--------------------|----------------------|-----------|-----------------|----------------------|-----------|-----------------------------|
| Child Maintenance: | <input type="text"/> | per month | Rent: | <input type="text"/> | per month | |
| Education: | <input type="text"/> | per month | Transport: | <input type="text"/> | per month | |
| Entertainment: | <input type="text"/> | per month | Utilities: | <input type="text"/> | per month | |
| Food/Housekeeping: | <input type="text"/> | per month | Other: | <input type="text"/> | per month | |
| Insurance: | <input type="text"/> | per month | Phone/Internet: | <input type="text"/> | per month | Total: <input type="text"/> |

Financial Security

Have you received advice from an accountant, solicitor, or financial planner regarding your requirements or financial objectives?

Yes, or thought about getting advice No

If yes, provide details:

Difficulty in Meeting Financial Commitments

Have you had difficulty in meeting any financial commitments in the past 2 years?

Applicant 1: Yes No Applicant 2: Yes No

If yes, provide details:

Loan Features

Preferred Interest Rate Type:

Fixed Rate Variable Rate Fixed and Variable Rate No Preference

Please note that should you choose to break a fixed term loan before expiry, lenders usually apply a break fee. This varies according to economic markets at the time of the break and can not be determined ahead of time.

Preferred Repayment Type:

Principle and Interest Interest Only in Advance
 Interest Only No Preference

Financial Judgements, Attachments or Legal Proceedings

Have there been or are there any judgements, attachments or legal proceedings against you?

Applicant 1: Yes No Applicant 2: Yes No

Change to Your Current Circumstances

Do you anticipate an increase in your expenses and/or liabilities over the next 12 months? (excluding this loan application)

Applicant 1: Yes No Applicant 2: Yes No

Do you anticipate a decrease in your income in the next 12 months?

Applicant 1: Yes No Applicant 2: Yes No

If you operate a business, do you anticipate a reduction in income, profit, cash flow during the next 12 months?

Applicant 1: Yes No N/A Applicant 2: Yes No N/A

If yes to any of the above, please specify details below and how you will continue to make repayments:



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Protecting Your Lifestyle

Do you feel that you have enough insurance to protect your lifestyle (eg. income protection, total/permanent disability Insurance, critical illness etc.)?

Applicant 1: Yes No

Applicant 2: Yes No

How would your lifestyle needs be maintained if you or your partner were:

- Temporarily unable to earn an income, for example through sickness/illness?
- Permanently unable to earn income, for example through death/permanent disability?

Lenders

Are there Lenders you prefer?

Are there Lenders you don't like?

What is your biggest concern with regards to borrowing money?

Anything else you think we should know?

Thank You!

If you need help obtaining and or emailing this information please contact:

Tamer Soliman
P: 03 9555 5944
E: info@solimanfinance.com.au
Soliman & Associates Pty Ltd
ACN: 068 259 683
Australian Credit License Number: 393407

[Send to Tamer Soliman](#)