



Strategic Financing - Please Fax this form to (07) 5679 2461 or email mitch@financefitnesscoaching.com.au

Client 1.

Client 2.

Title  Mr  Mrs  Ms  Miss  Dr

Surname

First Names

D.O.B / / Drivers Licence

Passport No.

Address

State  P/code

At current address since

Postal Address

Previous Address (If less than 3yrs)

Time there  Years  Months

Phone Numbers H ( )   
W   
M

Email Address

Marital Status

Number of Dependents  Age(s)

Mothers Maiden Name

Nearest Relative

Phone Number

Address

Mr  Mrs  Ms  Miss  Dr

/ / Drivers Licence

Passport No.

At current address since

Years  Months

H ( )   
W   
M

Marital Status

Age(s)

**THIS IS NOT AN APPLICATION FORM**

**Employment Details**

Client 1.

Client 2.

3 Years only, needed for employment history

3 Years only, needed for employment history

**Occupation**



**Current Employer**



Date started

Date started

**Employers**



**Contact Details**



**Previous**



**Employment**



**INCOME DETAILS**

**Gross Income**

WK / F/N / MTH / YR

**Gross Income**

WK / F/N / MTH / YR

**Family Allowance**

F/N

**Family Allowance**

F/N

**Other Income**

P/M

**Other Income**

P/M

**For Self Employed Applicants**

**ABN:-**



**ABN Business name**



**Date GST registered**

/ /

**Date ABN registered**

/

**GST registered**

/

**ABN registered**

/

/

Is there any Banks or Lending Institutions you do not like dealing with?

Yes/ No

Initial

Does the applicant anticipate any change to their income over the next 12 months?

Yes/No

Initial

Does the applicant anticipate any change in expenditure over the next 12 months (excluding the credit being applied for?)

Yes/No

Initial

Are there any Geographical factors which contribute to higher living expenses?

Yes/No

Initial

## Assets & Liabilities

### ASSETS

### VALUE

Home Address:  \$

### Investment Properties

I P 1 Address:  \$

I P 2 Address:  \$

I P 3 Address:  \$

I P 4 Address:  \$

I P 5 Address:  \$

For additional Investment Properties, add another page

### Other Assets

### VALUE

Vehicle 1, Make/Model:-  \$

Vehicle 2, Make/Model:-  \$

Shares / Funds  \$

Insured Value of Contents  \$

Institution

Superannuation / SMSF  \$

Institution

Savings  \$

Institution

Savings  \$

Institution

Term Deposits  \$

Business Value  \$

Other Investments  \$

Boat/s  \$

Caravan  \$

**Total Asset Value**  \$

**SURPLUS ASSETS**

### LIABILITIES

### Balance Owing:

Monthly Payments  \$   
Mortgage with:

Monthly Payments  \$   
Mortgage with:

Monthly Payments  \$   
Mortgage with:

Monthly Payments  \$   
Mortgage with:

Monthly Payments  \$   
Mortgage with:

Monthly Payments  \$   
Mortgage with:

### Other Liabilities

### Monthly

### Balance Owing

Leases/Hire  \$   
Purchase  \$

### Personal or Other Loans

Lender:  \$

Lender:  \$

### Credit Cards

Type	Limit	Institution	BALANCE
Visa	<input style="width: 50px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 50px;" type="text"/>
Mastercard	<input style="width: 50px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 50px;" type="text"/>
Other	<input style="width: 50px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 50px;" type="text"/>
Is your Credit Card Debt Cleared Monthly		<input style="width: 50px;" type="text"/> Y / N	Balance <input style="width: 50px;" type="text"/>

Margin Loan

Debt on Business  Y / N  Balance

Any contingent liability, partnership or company interests or other G'tees

Rent Mthly  Wkly

**TOTAL MONTHLY LIABILITIES**

**Total Liability Value**  \$

Please note we must know total limits of all loans regardless of current balances

## Real Estate Assets

<p><u>Home (address)</u> <input style="width: 90%;" type="text"/></p> <p><u>Market Value</u> <input style="width: 80%;" type="text"/> \$ <input style="width: 10%;" type="text"/></p> <p><u>Names on Title</u> <input style="width: 95%;" type="text"/> <input style="width: 95%;" type="text"/></p> <p><u>Trust Type</u> <input style="width: 95%;" type="text" value="Disc (Family) / Hybrid / Unit"/></p> <p><u>Insurer</u> <input style="width: 95%;" type="text"/></p> <p><u>Amount insured</u> <input style="width: 20%;" type="text"/> Cost <input style="width: 20%;" type="text"/></p> <p><u>Date Purchased</u> <input style="width: 20%;" type="text"/></p>	<p><u>Lender</u> <input style="width: 100px;" type="text"/> Split 1 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p style="text-align: right;">2 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p><u>LOC (Bal)</u> \$ <input style="width: 100px;" type="text"/> Limit 3 \$ <input style="width: 80px;" type="text"/></p> <p style="text-align: right;"><u>Total</u> \$ <input style="width: 80px;" type="text"/></p> <p><u>Int' Rate 1</u> <input style="width: 40px;" type="text"/> % 2 <input style="width: 40px;" type="text"/> % 3 <input style="width: 40px;" type="text"/> %</p> <p><u>LVR</u> <input style="width: 40px;" type="text"/> %</p> <p><u>LMI on original loan ?</u> <input style="width: 60px;" type="text" value="Y / N"/></p>
<p><b><u>Inv Prop 1</u></b> <input style="width: 95%;" type="text"/></p> <p><u>Market Value</u> <input style="width: 15%;" type="text"/> Rental p/w <input style="width: 30%;" type="text"/></p> <p><u>Names on Title</u> <input style="width: 95%;" type="text"/> <input style="width: 95%;" type="text"/></p> <p><u>Trust Type</u> <input style="width: 95%;" type="text" value="Disc (Family) / Hybrid / Unit"/></p> <p><u>Insurer</u> <input style="width: 95%;" type="text"/></p> <p><u>Amount insured</u> <input style="width: 20%;" type="text"/> Cost <input style="width: 20%;" type="text"/></p> <p><u>Date Purchased</u> <input style="width: 20%;" type="text"/></p>	<p><u>Lender</u> <input style="width: 100px;" type="text"/> Split 1 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p style="text-align: right;">2 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p><u>LOC (Bal)</u> \$ <input style="width: 100px;" type="text"/> Lmt 3 \$ <input style="width: 80px;" type="text"/></p> <p style="text-align: right;"><u>Total</u> \$ <input style="width: 80px;" type="text"/></p> <p><u>Int' Rate 1</u> <input style="width: 40px;" type="text"/> % 2 <input style="width: 40px;" type="text"/> % 3 <input style="width: 40px;" type="text"/> %</p> <p><u>LVR</u> <input style="width: 40px;" type="text"/> %</p> <p><u>LMI on original loan ?</u> <input style="width: 60px;" type="text" value="Y / N"/></p>
<p><b><u>Inv Prop 2</u></b> <input style="width: 95%;" type="text"/></p> <p><u>Market Value</u> <input style="width: 15%;" type="text"/> Rental p/w <input style="width: 30%;" type="text"/></p> <p><u>Names on Title</u> <input style="width: 95%;" type="text"/> <input style="width: 95%;" type="text"/></p> <p><u>Trust Type</u> <input style="width: 95%;" type="text" value="Disc (Family) / Hybrid / Unit"/></p> <p><u>Insurer</u> <input style="width: 95%;" type="text"/></p> <p><u>Amount insured</u> <input style="width: 20%;" type="text"/> Cost <input style="width: 20%;" type="text"/></p> <p><u>Date Purchased</u> <input style="width: 20%;" type="text"/></p>	<p><u>Lender</u> <input style="width: 100px;" type="text"/> Split 1 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p style="text-align: right;">2 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p><u>LOC (Bal)</u> \$ <input style="width: 100px;" type="text"/> Lmt 3 \$ <input style="width: 80px;" type="text"/></p> <p style="text-align: right;"><u>Total</u> \$ <input style="width: 80px;" type="text"/></p> <p><u>Int' Rate 1</u> <input style="width: 40px;" type="text"/> % 2 <input style="width: 40px;" type="text"/> % 3 <input style="width: 40px;" type="text"/> %</p> <p><u>LVR</u> <input style="width: 40px;" type="text"/> %</p> <p><u>LMI on original loan ?</u> <input style="width: 60px;" type="text" value="Y / N"/></p>
<p><b><u>Inv Prop 3</u></b> <input style="width: 95%;" type="text"/></p> <p><u>Market Value</u> <input style="width: 15%;" type="text"/> Rental p/w <input style="width: 30%;" type="text"/></p> <p><u>Names on Title</u> <input style="width: 95%;" type="text"/> <input style="width: 95%;" type="text"/></p> <p><u>Trust Type</u> <input style="width: 95%;" type="text" value="Disc (Family) / Hybrid / Unit"/></p> <p><u>Insurer</u> <input style="width: 95%;" type="text"/></p> <p><u>Amount insured</u> <input style="width: 20%;" type="text"/> Cost <input style="width: 20%;" type="text"/></p> <p><u>Date Purchased</u> <input style="width: 20%;" type="text"/></p>	<p><u>Lender</u> <input style="width: 100px;" type="text"/> Split 1 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p style="text-align: right;">2 \$ <input style="width: 80px;" type="text"/> I/O P&amp;I</p> <p><u>LOC (Bal)</u> \$ <input style="width: 100px;" type="text"/> Lmt 3 \$ <input style="width: 80px;" type="text"/></p> <p style="text-align: right;"><u>Total</u> \$ <input style="width: 80px;" type="text"/></p> <p><u>Int' Rate 1</u> <input style="width: 40px;" type="text"/> % 2 <input style="width: 40px;" type="text"/> % 3 <input style="width: 40px;" type="text"/> %</p> <p><u>LVR</u> <input style="width: 40px;" type="text"/> %</p> <p><u>LMI on original loan ?</u> <input style="width: 60px;" type="text" value="Y / N"/></p>

# Goals, Dreams and Aspirations

## Next Twelve Months

Personal


Investment


Super/SMSF


## Next 3 Years

Personal


Investment


Super/SMSF


## Next 5 Years

Personal


Investment


Super/SMSF


## Privacy Statement

Finance Fitness Coaching (FFC) respects and is committed to protecting your privacy as a client of FFC Associated entities of FFC, FFC's financial advisers or solicitors or other legal representatives in order to allow FFC to comply with its obligations and / or other general legal or business requirements; and pursuant to this information sheet. This Privacy Statement sets out FFC's policy in regard to Personal Information received from you, your rights in regard to the disclosure or non disclosure of that information to other parties and how FFC may generally use that information.

### **What Personal Information you may be requested and collected by FFC**

FFC or the FFC's Agent may ask you for the following information:

- Your name, address and contact information. The requested information may include your work, home or mobile telephone numbers and or e-mail contact details.
- Your assets and liabilities.
- Your goals, dreams and aspirations.
- Your property and life insurance details.
- Your professional contacts.

Personal Information relating to race, personal opinions, religious or sexual orientation, health or personal habits or political participation may not and will not be collected from you without your prior consent.

### **Collection**

Any information requested will be collected from you personally unless you consent or direct us to obtain the information from other sources. You consent to the use of the information as detailed in this Privacy Statement.

### **Use**

The information will be used for the purpose of having members of FFC's Referral Network contacting you. Whilst you are not required to supply such information, such information may be critical to the processing of your lending requirements. Failure to supply the requested information may affect FFC's ability to respond or correspond with you, and in turn may affect whether FFC may assist you with your lending requirements.

Nb (FFC's Referral Network includes, but not limited to, associated entities of FFC financial advisers, accountants, solicitors and insurance brokers).

### **The Personal Information may be used by FFC for:**

- (a) Reporting to:
  - Associated entities of FFC, FFC's financial advisers or solicitors or other legal representatives in order to allow FFC to comply with its obligations and / or other general legal or business requirements; and
  - Any possible referrer such as a solicitor, accountant, financial advisor or other professional that may assist you with your lending requirements, tax planning and succession planning.
- (b) Insurance purposes.

If you are unhappy with the collection and use of the information by FFC or wish to impose greater use restrictions than those set out in this Privacy Statement you should contact FFC via the contact details set out in this Privacy Statement.

### **Recipients of the Personal Information**

The Recipients of any Personal Information referred by FFC are likely to be:

- FFC's associated entities.
- FFC's financial and legal advisers.
- FFC's Referral Network.

The Recipient may be an Australian citizen, entity or government body or may be external to Australia. If the Recipient is external to Australia, FFC shall endeavour to ensure that the Recipient is legally required under the laws of the foreign country to, or undertakes to, abide by similar privacy restrictions.

**Scrutiny and Accountability for Personal Information**

If information is sought other than the information strictly required for your lending purposes or as listed in this Privacy Statement, FFC will provide specific details as to the way FFC may use the information.

You may at any time request confirmation from FFC as to the Personal Information held or request access to the information. FFC shall upon receipt of any request in writing for such information or access use its best endeavours to cause the Recipients of the Personal Information to assist your inquiries unless any one of the following applies:

- The request for access by you is frivolous or vexatious.
- Providing the requested access or confirmation would prejudice either the privacy of others or commercial negotiations and dealings between FFC and other parties.
- The request is unlawful.

If you are denied access or confirmation you will be supplied with reasons for such refusal. identity.

**Protection of your Personal Information**

FFC has implemented, and has directed any person using the Personal Information to take, reasonable steps to safeguard and protect your Personal Information. Such steps include:

- Secure storage of the information via either physical or electronic format.
- The destruction or de-identification of the information once it is no longer required or needed.
- Safeguards to ensure that the information is not accessed by unauthorised persons or recipients.

**Greater Information as Privacy Rights**

The *Privacy Act* (Cwth) and related legislation applies to the collection of any information from you. Should you wish to you may obtain copies of:

[Ø The Privacy Act \(Cwth\) 1998 and the Privacy Amendment Act \(Private Sector\) Act \(Cwlth\) at the Australian Legal Information Institute's \(AUSTLII\) website at www.austlii.edu.au ; and](#)

[Ø The National Privacy Principles at www.privacy.gov.au](#)

**Contacting FFC or its Lawyers**

Should you wish to discuss the collection of your Personal Information by FFC in connection with the Franchise please contact :

The responsible Director of FFC, or its lawyers, at these contact details

<u>Anthony Mitchell (Director)</u>	
<b>FFC Group Pty Ltd</b>	
<i>Address:</i>	Po Box 6105, Gold Coast MC 9726
<i>Phone:</i>	<b>0408 785 797</b>
<i>Fax:</i>	07 5679 2461
<i>Email:</i>	<i>mitch@financefitnesscoaching.com.au</i>

**Disclaimer**

From time to time FFC may provide your details to solicitors, accountants and other professionals that may assist you. Whilst FFC maintain confidence in its Referral Network, FFC is in no way responsible or liable for the action or advices of any members of FFC's Referral Network. Accordingly, FFC disclaims all responsibility and all liability (including, without limitation, liability in negligence) for all expenses, losses, damages and costs you might incur or suffer as a result of the actions or advices from FFC's Referral Network to you. security of the information. FFC and its associates will not be liable in any way in relation to any breach of security or disclosure of information.

Signed.....

Client 1

Date.....

Signed.....

Client 2

## Health CheckUP Overview.

Thank you for participating in your Health CheckUp.

We do have several other things by law we have to ask you about.

We have reviewed your:

Current Investments, Assets & Liabilities	Client 1	Initial	Client 2	Initial
Would you like us to review your loan position & structure?	Y / N	_____	Y / N	_____

General Insurance and Investment Insurance	Client 1	Initial	Client 2	Initial
Would you like us to refer you to an General Insurance agent? ( House , Contents & Landlords)	Y / N	_____	Y / N	_____

Personal Insurance, including	Client 1	Initial	Client 2	Initial
Life Insurance				
TPD Insurance				
Income Protection				
Trauma Insurance				
Referral to a Financial Planner / Insurance agent?	Y / N	_____	Y / N	_____

Legal Obligations	Client 1	Initial	Client 2	Initial
Your Will	Y / N	_____	Y / N	_____
Your Enduring Power of Attorney	Y / N	_____	Y / N	_____

Professional Contacts	Client 1	Initial	Client 2	Initial
Accountants	Y / N	_____	Y / N	_____
Lawyer	Y / N	_____	Y / N	_____
Financial Planner	Y / N	_____	Y / N	_____
Structuring Specialist	Y / N	_____	Y / N	_____

Name \_\_\_\_\_

Name \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_