

## CLIENT FACT FINDER

|                                                |                                             |                                          |
|------------------------------------------------|---------------------------------------------|------------------------------------------|
| <b>Personal<br/>Details</b><br><br>Applicant 1 | GIVEN NAME(S) _____                         |                                          |
|                                                | SURNAME _____                               |                                          |
|                                                | ADDRESS _____                               |                                          |
|                                                | _____ P/CODE _____ MOVE IN DATE _____       |                                          |
|                                                | PREVIOUS ADDRESS (if less than 3 yrs) _____ |                                          |
|                                                | _____ P/CODE _____ MOVE IN DATE _____       |                                          |
|                                                | DATE OF BIRTH _____ / _____ / _____         | DRIVERS LICENCE NO. _____ EXP DATE _____ |
|                                                | MALE      FEMALE                            | MARITAL STATUS _____                     |
|                                                | NO. DEPENDENTS _____                        | AGES _____                               |
|                                                | TEL. HOME (____) _____                      | MOBILE _____                             |
|                                                | TEL WORK (____) _____                       | EMAIL _____                              |
|                                                | EMPLOYER _____                              | OCCUPATION _____                         |
|                                                | EMPLOYER ADDRESS _____                      | _____ P/CODE _____ COMMENCE DATE _____   |
|                                                | GROSS SALARY \$ _____ p.a.                  |                                          |
|                                                | PREVIOUS EMPLOYER (if less than 2yrs) _____ | OCCUPATION _____                         |
| PREVIOUS EMPLOYER ADDRESS _____                | COMMENCE DATE _____                         |                                          |
|                                                | _____ P/CODE _____                          |                                          |
| <b>Notes</b>                                   | _____<br>_____<br>_____<br>_____            |                                          |

### Personal Details

Applicant 2

GIVEN NAME(S) \_\_\_\_\_

SURNAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_ P/CODE \_\_\_\_\_ MOVE IN DATE \_\_\_\_\_

PREVIOUS ADDRESS (if less than 3 yrs) \_\_\_\_\_

\_\_\_\_\_ P/CODE \_\_\_\_\_ MOVE IN DATE \_\_\_\_\_

DATE OF BIRTH \_\_\_\_/\_\_\_\_/\_\_\_\_ DRIVERS LICENCE NO. \_\_\_\_\_ EXP DATE \_\_\_\_\_

MALE FEMALE MARITAL STATUS \_\_\_\_\_

NO. DEPENDENTS \_\_\_\_\_ AGES \_\_\_\_\_

TEL. HOME (\_\_\_\_) \_\_\_\_\_ MOBILE \_\_\_\_\_

TEL WORK (\_\_\_\_) \_\_\_\_\_ EMAIL \_\_\_\_\_

EMPLOYER \_\_\_\_\_ OCCUPATION \_\_\_\_\_

EMPLOYER ADDRESS \_\_\_\_\_

\_\_\_\_\_ P/CODE \_\_\_\_\_ COMMENCE DATE \_\_\_\_\_

GROSS SALARY \$ \_\_\_\_\_ p.a.

PREVIOUS EMPLOYER (if less than 2yrs) \_\_\_\_\_ OCCUPATION \_\_\_\_\_

PREVIOUS EMPLOYER ADDRESS \_\_\_\_\_ COMMENCE DATE \_\_\_\_\_

\_\_\_\_\_ P/CODE \_\_\_\_\_

### Notes

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Altitude

## FINANCE

| ASSETS | Estimated Value |
|--------|-----------------|
|--------|-----------------|

Home at \_\_\_\_\_

Other Property/Land at

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Savings (Institution)

\_\_\_\_\_

\_\_\_\_\_

Motor Vehicle (Make, Model & Year)

\_\_\_\_\_

\_\_\_\_\_

Other Assets (Furniture, Boat, Business Goodwill etc.)

\_\_\_\_\_

\_\_\_\_\_

Other Investments

\_\_\_\_\_

\_\_\_\_\_

Superannuation (Institution)

\_\_\_\_\_

\_\_\_\_\_

| LIABILITIES | Monthly Payments | Balance Owing/ Limit |
|-------------|------------------|----------------------|
|-------------|------------------|----------------------|

Lender \_\_\_\_\_

Other Property Loans

Lender \_\_\_\_\_

Rental p/w \_\_\_\_\_

Lender \_\_\_\_\_

Rental p/w \_\_\_\_\_

Lender \_\_\_\_\_

Rental p/w \_\_\_\_\_

Personal Consumer Loans

Lender \_\_\_\_\_

Loan Type \_\_\_\_\_

Lender \_\_\_\_\_

Loan Type \_\_\_\_\_

Other

Rent/Board \_\_\_\_\_

Family Allowance \_\_\_\_\_

Credit/Store/Charge Cards

Issuer \_\_\_\_\_ Limit \$ \_\_\_\_\_

Issuer \_\_\_\_\_ Limit \$ \_\_\_\_\_

Issuer \_\_\_\_\_ Limit \$ \_\_\_\_\_

Issuer \_\_\_\_\_ Limit \$ \_\_\_\_\_

| <u>Insurances</u>         | <u>Provider</u> |
|---------------------------|-----------------|
| Income Protection         | _____           |
| Life Insurance            | _____           |
| Accident/Trauma           | _____           |
| Home & Contents Insurance | _____           |
| Landlord Protection       | _____           |

## Privacy Disclosure Statement and Consent

Altitude Finance is collecting personal information about you. This notice is to inform you of your rights under the Privacy Act.

- ✓ The information you provide will be held by Altitude Finance.
- ✓ You can gain access to the information we hold about you by contacting us at PO BOX 6755, Tweed Heads South NSW 2486.
- ✓ We may use the personal information you provide for the purposes of arranging or providing credit and for direct marketing of products and other services offered by Altitude Finance or an organisation we are affiliated with or represent. You have the right to request not to receive direct marketing material.
- ✓ We may disclose personal information about you as required by law, or to any organisation involved with providing credit to you, or any other associates or contractors of Altitude Finance, including, for example, statement printing houses, solicitors, accountants or people considering acquiring or taking an interest in our business or our assets.
- ✓ If you do not provide your personal information we may be unable to assist in arranging finance on your behalf.

You agree that Altitude Finance may collect and use your personal information as specified above.

I hereby accept and agree to the terms  
of the Altitude Finance privacy policy

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of the Altitude Finance privacy policy

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Please tick here if you do not wish to receive our email newsletters and updates