

# New Client Snapshot

<b>Client 1</b>				<b>Client 2</b>					
First Name:				First Name:					
Last Name:		DOB:		Last Name:		DOB:			
Mobile:		Other:		Mobile:		Other:			
Email:				Email:					
Best Contact:		When		Referral Source:					
First Home Owner:	Yes	No		Dependants:	Yes	No	Ages:		
Credit History:	Good	Not Sure	Defaults	Credit History:	Good	Not Sure	Defaults		
Current Situation:	Buying	Renting	How Long:	Agent:			Rent p/w \$		
Address:						Post Code:			
Occupation:				Occupation:					
Employer:				Employer:					
Employment is:	F/T	P/T	Contract	Employment is:	F/T	P/T	Contract		
Time Employed:		Yrs	Mths	Time Employed:		Yrs	Mths		
Self Employed:	Yes	No	ABN for	Yrs	Self Employed:	Yes	No	ABN for	Yrs
Income before tax	\$			Income before tax	\$				
Rental Property 1	\$			Rental Property 1	\$				
Rental Property 2	\$			Rental Property 2	\$				
CSA / Family A/B	\$			CSA / Family A/B	\$				
Other Income	\$			Other Income	\$				
Assets	Estimated Value	Liabilities	Outstanding Balance	Mthly Pmt or Limits	Interest Rate	I/O or P&I	Fixed or Variable	Bank	
Property 1 O/O	\$	Property 1 Loan	\$	\$	%				
Property 2 Inv	\$	Property 2 Loan	\$	\$	%				
Property 3 Inv	\$	Property 3 Loan	\$	\$	%				
Motor Vehicles 1	\$	Personal Loan 1	\$	\$	%				
Motor Vehicles 2	\$	Personal Loan 2	\$	\$	%				
Home Contents	\$	Credit Card 1	\$	\$	%				
Shares	\$	Credit Card 2	\$	\$	%				
Bank Account 1	\$	Store Card 1	\$	\$	%				
Bank Account 2	\$	Child Support	\$	<b>Notes</b>					
Client 1 Super	\$	Hec's / Help	\$						
Client 2 Super	\$	ATO	\$						
Other	\$	Other	\$						
	\$		\$						
<b>Total Assets</b>	<b>\$</b>	<b>Total Liabilities</b>	<b>\$</b>						
I/We authorise the release of information contained herein to Network HQ affiliated partners as necessary to assess and provide financial options regarding both my current and future financial requirements on the basis that such information is treated as private and confidential.									
Client 1				Client 2					
<b>X</b>				<b>X</b>					
Signature		Date		Signature			Date		