



PCS Finance (Brisbane) Pty Ltd ABN 86 139 442 208

40 Prospect St, Fortitude Valley Qld 4006

PH: 07 3252 2219 FAX: 07 3252 2812 MOB: 0417 713 289

e-mail: damien@pcsfinance.com.au

Australian Credit Licence number 382424

CLIENT PARTICULARS



PERSONAL DETAILS

APPLICANT 1	
Name in full	
PREFERRED NAME	
Residential Address:	
Street (No. & Name) <input type="text"/>	
Suburb <input type="text"/>	Postcode <input type="text"/>
Time at current address: <input type="text"/> Years <input type="text"/> Months	
Driving Licence Number <input type="text"/>	
State of issue <input type="text"/>	
Date of Birth <input type="text"/>	
Are you a permanent Australian resident? Yes No	
Marital status <input type="text"/> No. of dependants <input type="text"/>	
Home Phone <input type="text"/>	Work Phone <input type="text"/>
Mobile <input type="text"/>	
Email <input type="text"/>	
Previous Address (if < 2 yrs)	
Street (No. & Name) <input type="text"/>	
Suburb <input type="text"/>	Postcode <input type="text"/>
Time There: <input type="text"/> Years <input type="text"/> Months	

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Time There: <input type="text"/> Years <input type="text"/> Months	

Purchasing Entity Name <input type="text"/>

Directors Names:
1
2

ACN:
ABN:

Please list all Beneficiaries / Shareholders (if applicable):
1
2
3
4

Shares % owned:
1
2
3
4

Solicitor

Accountant



EMPLOYMENT DETAILS

EMPLOYMENT DETAILS (MINIMUM 2 YEAR HISTORY)		
Employment Type		
Full Time	Part Time	Casual
Self Employed	Not Employed	
Occupation		
<input type="text"/>		
Currently under a probationary period		
Yes	No	
Length of probationary period <input type="text"/>		
Current Employer's Name <input type="text"/>		
Phone Number <input type="text"/>		
Time at current employer:		
<input type="checkbox"/> Years	<input type="checkbox"/> Months	
Previous Employer (If < 2 years with current employer)		
<input type="text"/>		
Occupation <input type="text"/>		
Time at current employer:		
<input type="checkbox"/> Years	<input type="checkbox"/> Months	

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Occupation <input type="text"/>		
Time at current employer:		
<input type="checkbox"/> Years	<input type="checkbox"/> Months	

Working Background History and any Degrees / Qualifications obtained:



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FINANCE ASSESSMENT

BORROWERS REQUIREMENTS AND OBJECTIVES						
Loan 1 PURPOSE				Loan 2 PURPOSE		
IF YOU ARE REQUESTING TO REFINANCE, PLEASE COMPLETE THE FOLLOWING						
Existing Loan 1:						
Lender Name	Loan Amount	Product	Rate	Repayment	Payout (incl. fees)	Fixed/Variable
Existing Loan 2:						
Lender Name	Loan Amount	Product	Rate	Repayment	Payout (incl. fees)	Fixed/Variable
<p>Do you know of any foreseeable significant changes that could have an effect on your ability to make contracted repayments?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>IF YES, please provide more information e.g. Permanent or temp change in income.</p>						
<p>What's important to you in your loan?</p> <p>Interest Only / Principal & Interest <input type="checkbox"/></p> <p>Fixed / Variable <input type="checkbox"/></p> <p>Redraw <input type="checkbox"/></p> <p>Offset <input type="checkbox"/></p>						
<p>There are insurances available that are designed to help protect your ability to repay debt. Would you like more information regarding this insurance?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>						
<p>Are you aware of any loan / credit defaults against you?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>						



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ASSETS AND LIABILITIES

Client Name:					
\$ Repay PM	Liabilities	\$ Amount	Assets	\$ Amount	\$ Income PM
	Mortgages to		Home at		
			Other Properties		
	Car - Lease/Loan		Vehicles		
	Credit/Store Cards		Shares/Investments/Super		
			Furniture & Personal Effects		
			Business Goodwill		
	Total Liabilities	\$	Total Assets	\$	

\$
Total Repay PM

Surplus / (- Deficiency)	\$0	\$
		Total Income PM

I/We confirm that the above statement is true & correct.

Signature

Signature

Name

Name

Notes



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PRIVACY DISCLOSURE STATEMENT AND CONSENT

PCS Finance (Brisbane) ('we', 'us', 'our') is collecting personal and financial information about you.

1. The information you provide will be held by us.
2. You appoint us your agent to obtain your credit information from a credit reporting body on your behalf.
3. We may use credit information and any other information you provide to arrange or provide finance and other services.
4. We may exchange the information with the following types of entities, some of which may be located overseas.
 - Persons who provide finance or other products to you, or to whom an application has been made for those products.
 - Financial consultants, accountants, lawyers and advisers
 - Any industry body, tribunal, court or otherwise in connection with any complaint regarding our services
 - Any person where we are required by law to do so
 - Any of our associates, related entities or contractors
 - Your referees, such as your employer, to verify information you have provided
 - Any person considering acquiring an interest in our business or assets
 - Any organisation providing online verification of your identity
5. You may gain access to the personal information that we hold about you by contacting us. A copy of our privacy policy can be obtained at www.pcsfinance.com.au or by contacting us on **(07) 3252 2219**. Our privacy policy contains information about how you may access or seek correction of the information we hold about you, how we manage that information and our complaints process.

If you do not provide the information we may be unable to assist in arranging finance or providing other services. You agree that we may use and disclose your information as specified above.

By signing this consent I/we formally engage PCS Finance to act on my/our behalf and source a finance package to suit my/our requirements.

Name:

Name:

Signature:

Signature:

Date

Date