

DATE:



ARMADALE HOUSE
YOUR FINANCIAL PARTNERS FOR LIFE

Privacy Statement

The information collected in this form is for the sole purpose of establishing or building a Financial Services Relationship with you. Your personal and sensitive information is treated with the strictest of confidence and is only provided to third parties where you have consented. If you have any questions in relation to your privacy or rights or wish to access or correct personal information we hold on you please contact our Compliance or Privacy Officer on 039500 0500.

Contact Date / /	
Contact Date / /	
Contact Date / /	
Contact Date / /	
Contact Date / /	

Client Name/s	
Consultants Name	

ARMADALE HOUSE PTY LTD
ABN 28 095 723 283
SUITE 5, 39A GLENFERRIE ROAD
MALVERN VIC 3144
PH: 03 9500 0500 Fx: 03 9500 1988

PERSONAL SUMMARY DETAILS

Circle or Delete As Applicable	Primary Contact					Spouse / Partner						
	Mr	Mrs	Ms	Miss	Dr	Mr	Mrs	Ms	Miss	Dr		
Surname												
Given Names												
Marital Status												
Date of Birth	/					/						
Licence Number												
Licence Expiry Place of Issue	/					/						
No. of Dependents and ages												
Home Address												
Suburb State & Postcode												
Time There	Years					Months						
If a Tenant you pay	\$			<i>Weekly Rental</i>			<i>Monthly Rental</i>					
Prior Address												
Suburb State & Postcode												
Time There	Years					Months						
Home Phone												
Work Phone												
Facsimile Number												
Mobile Phone												
Email Address												

EMPLOYMENT DETAILS

Circle or Delete As Applicable	Primary Contact			Spouse / Partner		
	Self Employed PAYG	Not in the Workforce Retired		Self Employed PAYG	Not in the Workforce Retired	
Occupation						
Employer Name						
Address						
Suburb & State & Postcode						
Start Date	/		/	/		/
Circle or Delete As Applicable	Full Time	Part Time	Casual	Full Time	Part Time	Casual

Prior Employment – If less than three years with your current employer						
<i>Circle or Delete As Applicable</i>	Self Employed		Not in the Workforce		Self Employed	
	PAYG		Retired		PAYG	
Occupation						
Employer Name						
Suburb & State						
Start Finish Date	/ /	/ /	/ /	/ /	/ /	/ /
<i>Circle or Delete As Applicable</i>	Full Time	Part Time	Casual	Full Time	Part Time	Casual

INCOME DETAILS

		Primary Contact		Spouse / Partner	
Gross Weekly or Annual Income		\$		\$	
Other Income or Commissions		\$		\$	
Investment Income		\$		\$	
Child Maintenance Payments		\$		\$	
Non-Taxable Income		\$		\$	
Government Payments	Pension	\$		\$	
	Parenting Allowance	\$		\$	
	Part A	\$		\$	
	Part B	\$		\$	
Other		\$		\$	

IF SELF EMPLOYED

		Primary Contact			Spouse / Partner		
		Current YTD	Last Financial Year	Prior Financial Year	Current YTD	Last Financial Year	Prior Financial Year
Income		\$	\$	\$	\$	\$	\$
Taxable Income		\$	\$	\$	\$	\$	\$

ABN: COMPANY DETAILS

Company Name	ABN Number

PERSONAL ASSETS

	Value	Purchased Date	Owner	Details		
Principal Residence	\$	/ /	C S J			
Home Contents	\$					
Holiday Home, Vacant Land	\$	/ /	C S J			
Motor Vehicle No.1	\$	/ /	C S J	Make	Model	Year
Motor Vehicle No. 2	\$	/ /	C S J	Make	Model	Year
Boat Caravan	\$	/ /	C S J			
Superannuation Client	\$	/ /	C S J			
Superannuation Spouse	\$	/ /	C S J			
Investment Assets	\$	/ /	C S J			
Investment Assets	\$	/ /	C S J			
Investment Assets	\$	/ /	C S J			

PERSONAL EXPENSES

“Optional refer” to <http://www.armadalehouse.com.au/calc/budget.php> for detailed budget plan

	Weekly	Monthly	Quarterly	Annually
General Living Expenses	\$	\$	\$	\$
Utilities	\$	\$	\$	\$
General Family Purchases	\$	\$	\$	\$
Motor Vehicles & Transport	\$	\$	\$	\$
Insurance & Superannuation	\$	\$	\$	\$
Leisure & Entertainment	\$	\$	\$	\$
Unexpected	\$	\$	\$	\$

PERSONAL LIABILITIES

<i>Circle or Delete As Applicable</i>		Lender / Details / Security	Loan Value	Loan Limit	Repay- ments	Int Rate		Owner
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	
C/Card	Personal Loan		\$	\$	\$	%	W M	C S J
Mortgage	Invest Purpose						F Q	

Your Lending Requirements

Tell us about what type of lending you are seeking

Have you had any defaults, judgements or bankruptcy in the past, if yes, please provide some brief information

Tell us about any special features you would like as a part of your facility such as redraw, offset account, for investment purposes