

CONSUMER CLIENT DATA COLLECTION



DATE:

APPLICANT1

APPLICANT 2

Surname:		Surname:	
First name:	Middle Name:	First name:	Middle Name:
Are you renting: Yes No Rental Amount:		Are you renting: □Yes □No	Rental Amount:
Agent Details:		Agent Details:	
Current Address:		Current Address:	
State:	Postcode:	State: Po	ostcode:
Date moved in:		Date moved in:	
Previous Address (if less than 3 years at above address):		Previous Address (if less than 3 years at above address):	
State: I	Postcode:	State:Po	ostcode:
How long at above Address:		How long at above Address:	
Postal Address:		Postal Address:	
State:	Postcode:	State: Po	ostcode:
	Expiry Date:		Expiry Date:
	State:	Date of Issue:	State:
Medicare Card No:	Expiry Date:	Medicare Card No:	Expiry Date:
Mobile No:		Mobile No:	
Home Phone No:		Home Phone No:	
Email:		Email:	
No. of Dependants:	Ages:	No. of Dependants:	Ages:
Name:	DOB:	Name:	DOB:
Name:	DOB:	Name:	DOB:
Name:	DOB:	Name:	DOB:
Name:	DOB:	Name:	DOB:
Smoker:	General Health:	Smoker:	General Health:

HOME & CONTENTS INSURANCE DETAILS

HOME & CONTENTS INSURANCE DETAILS

Insurer:	Insurer:
Policy No:	Policy No:
Expiry Date:	Expiry Date:

CURRENT EMPLOYMENT	CURRENT EMPLOYMENT
Occupation:	Occupation:
Name of Employer:	Name of Employer:
Employer Address:	Employer Address:
Phone No: Start Date:	Phone No: Start Date:
PREVIOUS EMPLOYMENT	PREVIOUS EMPLOYMENT
Occupation:	Occupation:
Name of Employer:	Name of Employer:
Employer Address:	Employer Address:

Phone No: Start Date:	Phone No: Start Date:
NAME & ADDRESS OF NEAREST RELATIVE NOT LIVING WITH YOU.	NAME & ADDRESS OF NEAREST RELATIVE NOT LIVING WITH YOU.
Relationship: Phone:	Relationship: Phone:

ACCOUNT DETAILS	ACCOUNT DETAILS	
BSB:	BSB:	
Account Number:	Account Number:	
Financial Institution:	Financial Institution:	
Branch:	Branch:	
Have you ever been bankrupt or have adverse credit history?	Have you ever been bankrupt or have adverse credit history?	
□ YES □ NO	□ YES □ NO	
Details of adverse credit history	Details of adverse credit history	
Date:	Date:	
Amount:	Amount:	
Circumstances: 🗌 Paid 🗌 Unpaid.	Circumstances: 🗌 Paid 🗌 Unpaid.	



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SD Loans and Leasing Pty Ltd. ACL 377282 Sally Dixon Financial Services Pty Ltd ACL 377276