

*delivering strategic financial advice and
innovative solutions*



DATE:
What are your immediate property and investment objectives:
1)
2)
3)

NAME(S)

1. Title:	First	Last:	Date of Birth
2. Title:	First	Last:	Date of Birth
Address:			Postcode:
1	Tel (H / W) :	Mobile:	Email:
2	Tel (H / W):	Mobile:	Email:

Employment / Income

1	Occupation:	<input type="checkbox"/> PAYG	<input type="checkbox"/> Self-Emp ABN:	Gross Income p.a.	\$
2	Occupation:	<input type="checkbox"/> PAYG	<input type="checkbox"/> Self-Emp ABN:	Gross Income p.a.	\$

YOUR ASSETS

Property				Estimated Value
Residential Home:				\$
Investment property/ies	How Many?	Total Rent pa	\$	\$
Investments				
Cash / Savings:	With:			Value: \$
Shares / Managed Funds	Description:			Value: \$
Superannuation:	Fund(s)			Value: \$
Superannuation:	Fund(s)			Value: \$

YOUR LIABILITIES

Finances	Int. Rate	Mthly Payments	Int Only or P & I	Balances
Home:	%	\$	<input type="checkbox"/> I/O <input type="checkbox"/> P&I	\$
Investment Property/ies:	%	\$	<input type="checkbox"/> I/O <input type="checkbox"/> P&I	\$
Investment Loans (other)	%	\$	<input type="checkbox"/> I/O <input type="checkbox"/> P&I	\$
Personal Loans:	%	\$	<input type="checkbox"/> I/O <input type="checkbox"/> P&I	\$
Other Loan/s	%	\$	<input type="checkbox"/> I/O <input type="checkbox"/> P&I	\$
Credit Card/s	Total Limit(s)	\$		\$

YOUR INSURANCE

Life	TPD	Trauma	Income Protection	Sickness & Accident

SME Financial Services Group Pty Ltd ABN 65 955 872 828

Postal: PO Box 4209, Bay Village NSW 2261

t. 1300 340 060 f. (02) 8003 9869 e. info@smefinancialservices.com.au w. www.smefinancialservices.com.au

Privacy Policy: Should you require information about our privacy policy please contact us.

CMA Report request....

Please complete the information about the property and the relevant short questionnaire.

Address:		Postcode
No. Bedrooms		No. Bathrooms
		No. Garages
Purchase		Sell/Buy
		Refinance

Questions - Houses

(please tick the appropriate response for each question)

Don't dwell on your answer for each question; your immediate reaction is best.

Q1 – How does this house compare to others in the street? Is it: <input type="checkbox"/> Much better than most <input type="checkbox"/> Better than most <input type="checkbox"/> Similar <input type="checkbox"/> Worse than most <input type="checkbox"/> Much worse than most
Q2 – How does property look compare to others in the street? Is it: <input type="checkbox"/> Much better than most <input type="checkbox"/> Better than most <input type="checkbox"/> Similar <input type="checkbox"/> Worse than most <input type="checkbox"/> Much worse than most
Q3 – Is it newer or in better repair when compared to others in the Street? <input type="checkbox"/> Much better than most <input type="checkbox"/> Better than most <input type="checkbox"/> Similar <input type="checkbox"/> Worse than most <input type="checkbox"/> Much worse than most
Q4 – How does the size of the house compare to the typical for that street? <input type="checkbox"/> Much better than most <input type="checkbox"/> Better than most <input type="checkbox"/> Similar <input type="checkbox"/> Worse than most <input type="checkbox"/> Much worse than most
Q5 – How does this property's view or aspect compare to the typical for the street? <input type="checkbox"/> Much better than most <input type="checkbox"/> Better than most <input type="checkbox"/> Similar <input type="checkbox"/> Worse than most <input type="checkbox"/> Much worse than most

Questions - Units

(please tick the appropriate response for each question)

Don't dwell on your answer for each question; your immediate reaction is best.

Q1 – How does the age of the block of units compare to others in the street? <input type="checkbox"/> Brand new <input type="checkbox"/> Newer <input type="checkbox"/> Similar <input type="checkbox"/> Older <input type="checkbox"/> Really old
Q2 – How does the condition of the unit compare to others in the block and street? <input type="checkbox"/> Much better than most <input type="checkbox"/> Better than most <input type="checkbox"/> Similar <input type="checkbox"/> Worse than most <input type="checkbox"/> Much worse than most
Q3 – How does the size of the unit compare to other units in the block and street? <input type="checkbox"/> Far larger <input type="checkbox"/> Slightly larger <input type="checkbox"/> Similar <input type="checkbox"/> A bit smaller <input type="checkbox"/> a lot smaller
Q4 – How does the view from the unit compare to the typical for the block and street? <input type="checkbox"/> It is much better <input type="checkbox"/> It is slightly better <input type="checkbox"/> Similar <input type="checkbox"/> It is worse <input type="checkbox"/> It is a lot worse
Q5 – How is this property located compared to others in the block and street? <input type="checkbox"/> Much better located <input type="checkbox"/> Slightly better located <input type="checkbox"/> Similar <input type="checkbox"/> Slightly worse located <input type="checkbox"/> Much worse located