

Details Required	Applicant 1	Applicant 2
Surname		
First Name		
Email Address		
Home Phone		
Mobile		
Clean Credit History	Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure <input type="checkbox"/>
Any Rates or loan arrears	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Current ABN (N/A if none)		
Relationship to Applicant 2	Married <input type="checkbox"/> Defacto <input type="checkbox"/> Business Partner <input type="checkbox"/> Other <input type="checkbox"/>	
Dependents	Yes <input type="checkbox"/> No <input type="checkbox"/> Ages:	
Best Time to contact you	Day:	Time:
Give us a quick insight into your risk profile? 2 = very conservative 4 = conservative 6 = comfortable 8 = no worries 10 = full understanding		
Applicant 1	Applicant 2	

What strategies are you looking to do in property?

First Home <input type="checkbox"/>	Refinance <input type="checkbox"/>	Equity Release <input type="checkbox"/>
Buy and Hold <input type="checkbox"/>	Buy, Renovate & Hold <input type="checkbox"/>	Buy, Renovate & Sell <input type="checkbox"/>
Vendor Finance <input type="checkbox"/>	Exit Rent to Buy <input type="checkbox"/>	Second Mortgage Carry Back <input type="checkbox"/>
Construction <input type="checkbox"/>	Off The Plan <input type="checkbox"/>	Development <input type="checkbox"/>
Other <input type="checkbox"/> (please specify):		

What sort of Investment do you Prefer?

Capital Growth Tax minimisation Neutral/ Positive Geared Project/ Deals

Your Preferred Investment Location

All States NSW QLD VIC WA SA NT

Known Postcode/s:

Preferred Property Price Range

To \$250000 \$250000 to \$400000 \$400000 to \$650000 \$650000 +

Known \$:

Future Property Ownership Details (Either Personal or Other Structure)

Personal Name/s 1: _____ 2: _____

OR Company Dis Trust SMSF Other (specify): _____

State Full Legal Name Of Entity Here:

All Property Assets and Liabilities								
	Street Address	Post Code	Owning Entity	Value	Debt	Lender	Interest Rate	Weekly Rent
1								
2								
3								
4								
5								
User another page if more property assets				Totals				

General Liabilities					General Assets				
	Limit	Curr Debt	Lender	Mthly \$		Applicant 1		Applicant 2	
Credit Card 1					Car/ vehicle	Type	\$	Type	\$
Credit Card 2					Superannuation				
Personal Loan 1					Savings				
Personal Loan 2					Shares				
Rent Paid	Yes <input type="checkbox"/> No <input type="checkbox"/>		\$ Per week		Other Assets				

Income, Employment/ Business Summary						
	PAYG/ Self Emp	FT/ PT/ Cash / Other	Employer/ Bus Name	Employ Time	Occupation/ Role	Gross Income
Person 1						
Person 2						
Business Name			Web Address		ABN	
Other Investments	Business		Shares		Other	

PORTFOLIOS OFFERS A COMPREHENSIVE RANGE OF PROPERTY INVESTMENT SERVICES THAT ALLOW US TO PARTNER WITH YOU ON YOUR SUCCESSFUL PROPERTY INVESTMENT JOURNEY.

Workshops and Information	
Are you interested in participating in further investment workshops?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you want to receive important investment tips and tools via email?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Portfolio and Financial Structure	
Do you require guidance on getting the most from your financial structure?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you require help with setting up a company & trust entity?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Property Sourcing	
Do you require assistance with sourcing property?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Your Potential Insurance Requirements			
Insurance Type	Applicant 1	Applicant 2	Other Information about insurance:
Life	<input type="checkbox"/>	<input type="checkbox"/>	
Disability	<input type="checkbox"/>	<input type="checkbox"/>	
Income Protection	<input type="checkbox"/>	<input type="checkbox"/>	
Home Building and Contents	<input type="checkbox"/>	<input type="checkbox"/>	
Landlords	<input type="checkbox"/>	<input type="checkbox"/>	

Depreciation Schedules	
Do all your investment properties have a current depreciation schedule	Yes <input type="checkbox"/> No <input type="checkbox"/>

Current Team	
Accountant <input type="checkbox"/> Financial Advisor <input type="checkbox"/> Conveyancing <input type="checkbox"/> Insurance Broker <input type="checkbox"/>	
Are you satisfied with all these providers?	

Goals and Outcomes (Your story / Strategies / What you are trying to do)
Write three (3) potential outcomes from our partnership.
1.
2.
3.

How Did You Hear About Us?

CONSENT TO DISCLOSE PERSONAL INFORMATION TO PORTFOLIOS

Portfolios PIF ATF Portfolios Trust (Portfolios) ACN 135 036 841 is required to collect, use and disclose information to provide the products and services requested by you or on your behalf.

PURPOSE FOR COLLECTING PERSONAL INFORMATION

You agree that we may collect, use and disclose your personal information for the following purposes:

- processing and tracking your requested services and products;
- processing commission payments;
- marketing and sales promotion;
- administrative operations including statistical reports, accounting, record keeping;
- complying with legislative and regulatory requirements;
- and developing, establishing and administering alliances and other arrangements with other organisations relating to the promotion, administration and use of our respective products and services.

DISCLOSURE OF PERSONAL INFORMATION

You agree and consent that we may disclose your personal information to each other (including related entities, employees, agents and persons otherwise engaged). You also agree and consent that we may disclose your personal information to the following types of persons and organisations for the purpose outlined above:

- banks, financial institutions, and other product or service providers;
- organisations with whom Portfolios has alliances and other arrangements and organisations considering an alliance, investment, or other arrangement with Portfolios;
- consultants, advisers and experts; and related entities, employees, contractors, agents and persons otherwise engaged by any of the above.

ACCESS TO YOUR PERSONAL INFORMATION

All your personal information held by Portfolios will be used and disclosed in accordance with the Portfolios Privacy Policy, available on the Portfolios web site www.portfolios.net.au. Subject to the provisions of the Privacy Act 1988 (Cth), you can arrange access to your personal information held by us by calling Portfolios office on (02) 49812930.

If you do not provide us with the requested personal information, Portfolios will not be able to supply you with the products or services requested by you or on your behalf.

You have the right at any time to request us not to telephone you or provide you with any further information about products and services and not to disclose your information to any other organisations for that purpose. You may do this by calling Portfolios office on (02) 49812930.

CLIENT CONSENT AND DECLARATION

I/we

- acknowledge that I/we have read the above and consent to my/our personal information being collected, used and disclosed as stated above. I/we also consent to Portfolios receiving a fee from the appointed lender for this transaction.
- consent to Portfolios contacting me by telephone, email, letter or any other means for marketing and sales promotion. I/we state that this consent to be contacted for marketing and sales promotion is a continuing consent unless I/we withdraw it by contacting Portfolios (which I/we may do at any time).
- I / we advise that the information provided on this form is complete and accurate to the best of my / our knowledge.
- I / we acknowledge that by not providing complete and accurate information on my / our personal and financial position, it may affect the outcome of our portfolio review.
- I / we authorise Portfolios to enter our application on an online software program with our personal details for a quicker turn around time for an indicative approval.

Applicant 1 Signature		Applicant 2 Signature	
Name (Print Clearly)		Name (Print Clearly)	
Date		Date	

Please complete now or forward this review to:

Fax: (02) 4981 3725

Email: enquire@portfolios.net.au

The typical timeframe for first pass review is 3 business days. If you require escalation, please inform us via email, call or with this document.

We look forward to working with you to **Make Property Happen.**