



Home / Investment Loan Evaluation

These few simple questions will allow Quay Finance to compare you current home or investment loan to other products through the many lenders available.

Date Completed: / /

Financial Advisor / Accountant Name:

1. Client Details

Client Name	
Email Address	
Preferred Contact Phone Number	

2. Owner Occupied Property

Current lender	
Estimated value of your home	
Estimated balance of your mortgage	
Current monthly repayment, or interest rate	
Estimated Date of establishment of this loan	

3. Investment Property

	Property 1	Property 2	Property 3
Current lender			
Estimated value of your home			
Estimated balance of your mortgage			
Current monthly repayment, or interest rate			
Estimated Date of establishment of this loan			

4. Insurance Information

-----	Life Insurance	Trauma	Income Protection
Amount			
Provider			
Premium paid			
Waiting period	n/a	n/a	
Benefit period	n/a	n/a	