

CLIENT PROFILE FORM

Personal Details

Your Relationship Manager
JUNIOR OSASA 0439 424 946

Given + middle Name: Dr Anecito Jr Sagrado

Surname: Mantilla

Date of Birth: 24/06/1974

Qualifications:

Profession: Medical Practitioner - General Practice

Year Qualified: 2000

Years in current practice: 3.75 years

Borrower: EMPLOYEE / CONTRACTOR / **COMPANY** / TRUST

Company Name: Mantilla Medical Pty Ltd

ABN: 43152083997

Trust Name:

Practice Address: 83 Wollombi Road Cessnock, NSW 2325

Work Number: 02-49904833

Mobile Number: 0439383622

Email Address / Fax Number: johnmmd@mantillamedical.com

Home Address: 17 Valley View Crescent, Glendale, NSW 2285

Accountant: Ju Tae YANG

Accountant Number: 0452 226 590

Statement of Position (Assets & Liabilities)

Description of Asset (include details)	Asset Value / Amount	Financier / Bank	Liability Value / Limit
Bank Account	\$ 20,000	Overdraft	\$
Credit Card Limit/s		CBA credit cards GE money interest free	\$ 35,000
Property – Home	\$ 430,000	St. George Bank	\$ 387,000
Property – Investment	\$ 290,000	St. George Bank	\$ 261,000
Property – Investment	\$		\$
Property – Practice	\$		\$
Practice Goodwill	\$		\$
Motor Vehicle/s	\$ 144,000	Audi and BMW finance	\$
Superannuation	\$ 100,000	SMSF	\$
Shares / Debentures	\$		\$
Personal Effects	\$		\$
(other)	\$		\$
TOTAL	\$ 984,000		\$ 683,000

Life / TPD Insurer: Asteron

Sum Insured For: \$ 1,525,000

Income Protection Insurer: Asteron

Sum Insured For: \$ 20,000 / month

Comments: Life /TPD owned by the applicant's SMSF

SIGN:



DATE: 24/02/2015