

CLIENT NAME/S:

DATE:



MERIDIAN AUSTRALIA **CLIENT REFERRAL QUESTIONNAIRE**

CLIENT REFERRAL QUESTIONNAIRE



YOUR CONTACT DETAILS

Full Name:

Business Name:

Phone [W]:

Email Address:

CLIENT/S CONTACT DETAILS

CLIENT A

CLIENT B

Full Name:

Phone (H):

Email Address:

Borrowing Capacity:

optional

Financially Pre-Approved:

YES

NO

Client/s Brief & Goals:

property price point etc.

Please email your completed questionnaire to info@meridianaustralia.com.au



Connect with us



02 9939 3249



meridianaustralia.com.au





www.meridianaustralia.com.au
info@meridianaustralia.com.au
02 9939 3249

This document is a fact finder enabling Meridian Australia to gain a further insight into your personal circumstances. Individual personal and financial circumstances and the needs of individuals differ. Investors should seek professional advice from their accountant or financial advisor before deciding to invest in any Meridian Australia product.

It is vital that the risk factors that could affect the financial performance of a property are considered. Risk factors include, but are not limited to: movements in interest rates, demographic changes, market demand and the political and economic environment.