



HOME LOAN STRATEGY SESSION

Working out what's best for you

NOTHING BEATS
COMING HOME.



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AGENDA

1. Welcome and Intro *2 min*
2. Your Needs & Objectives *3 min*
3. Your Current Situation *5 min*
4. Serviceability Check *10 min*
5. Scenario Testing/Policy Check *10 min*
6. Consider Options *10 min*
7. Crew Financial - Points of contact *2 min*
8. Next steps *3 min*



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WHAT YOU WILL NEED

1. Your income (Latest 2 payslips)
2. Information about your savings

Please give some thought to your current budget / living expenses, especially with regard to items such as private health insurance, private school fees and personal life insurances.

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