

Opportunity

Murray, 2 Wilma Avenue, Mulgrave, Victoria Australia

Edit

Total Disbursements

\$100,000.00

Home Value (AVM)

\$600,000.00

Total Household Loan Amount

\$101,500.00

No. of required docs remaining

0

Opportunity Owner

Paul Murr...

▼

MEM

Meeting

Apply

Assess

Settlement

Closed

Mark Stage as Complete

KEY FIELDS

Home Owner 2/Nominated Occupant ⓘ

Edit

GUIDANCE FOR SUCCESS

Do you need to add a second contact to this Household Account?

Do you need to include any addition Super Funds?

What are the Requirements & Objectives for the Household Loan?

Please upload the files associated with the account:

- Customer Data File
- Privacy Consent
- E-Consent
- Household Loan Summary
- Responsible Lending Checklist

Details

Purpose

Documents

Loans

Property

▼ Clients

Home Owner 1 ⓘ

Robert Murray (/lightning/r/0032O000002WyKeQAK/view)

Home Owner 2/Nominated Occupant ⓘ

Account Name ⓘ

Murray, 2 Wilma Avenue, Mulgrave, Victoria Australia (/lightning/r/0012O000003nkUDQAY/view)

▼ Opportunity Information

Opportunity Name

Murray, 2 Wilma Avenue, Mulgrave, Victoria Australia

Opportunity Owner

Paul Murray (/lightning/r/0052P000000JbVjQAK/view)

Lead Source

Advisor

Close Date

31/12/2018

Next Step

Stage

Meeting

Probability (%)

30%

Loss Reason

▼ Description Information

History

Log a Call

New Task

New Event

Recap your call...

Add

Filters: All time • All activities • All types

Refresh

Expand All

Next Steps

More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

Load More Past Activities

30/10/2018

Murray, 2 Wilma Avenue, Mulgrave, Victoria Australia | Salesforce

Description

Sandbox: PM [./secur/logout.jsp](#)

Household Loan Summary

Search Salesforce

★

+

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⚙

🔔

Establishment Fee (Percent) ⓘ

Home([/lightning/page/home](#))

C... ([/lightning/o/Event/home](#))

Tasks([/lightning/o/Task/home](#))

Le... ([/lightning/o/Lead/home](#))

Household Capital

1.50%

Total Disbursements

\$100,000.00

Murray, 2 Wilma Avenue, Mulgrave, Victoria Australia ⓘ

Total Household Loan Amount ⓘ

\$101,500.00

Establishment Fee ⓘ

\$10,500.00

\$600,000.00

\$101,500.00

0

[Paul Murr...](#)

Financial Position

Assets ⓘ

\$0.00

Liabilities ⓘ

\$0.00

Household Super ⓘ

\$0.00

Expenses ⓘ

\$0.00

System Information

Created By

[Paul Murray \(/lightning/r/0052P000000JbvjQAK/view\)](#)

30/10/2018 4:17 PM

Last Modified By

[Paul Murray \(/lightning/r/0052P000000JbvjQAK/view\)](#)

30/10/2018 4:21 PM