

## To be completed PRIOR to calling client

This page provides background information on the client, taken from their file. Please answer EVERY question.

Before you start make a note of the address of the property in question. You will need to refer to this address (e.g., your flat in Smith St, Fairfield).

Also note how long it is since this client's file was closed. You will need to refer to this time period.

### 1. CASES No/Client ID:

### 2. Client's first name

### 3. Type of assistance provided by service

Advice only

Minor Assistance

Casework

Other (please specify)

### 4. Date File Closed:

Date file closed:      DD      MM      YYYY  
 /  /

### 5. Number of months since file closed (NOTE: you will need to refer to this period in the questions)

### 6. Outcome at the time file closed

Retained home with repayment arrangement by negotiation

Retained home with repayment arrangement by order of EDR/Court

Client sold home

Home repossessed

Unknown

Other (please specify)

## Introduction to the survey

My name is ... from [Legal Aid NSW/ Consumer Credit Legal Centre ].

[6] months ago we provided you with some legal assistance concerning your mortgage. I am ringing now to follow up on how things have been with your mortgage situation since that time.

To let you know, we are doing this as part of a review of the services we provide, so, with your consent I will also ask about the help you received. Can I assure you, your answers will remain anonymous.

### 7. Are you happy to speak with me for 5-10 minutes now?

Yes

No, Decline interview

Not now/Another time

If 'not now', arrange another time and record here

### 8. IF THE CLIENT'S HOUSE WAS ALREADY SOLD WHEN THE CASE WAS CLOSED, CLICK HERE. (This will take you to next appropriate question)

HOUSE ALREADY SOLD OR REPOSSESSED

## Follow up information from clients

Please enter a response for EVERY question. Thank you.

**9. To start with, I just want to ask about your current situation with your housing/mortgage? Do you still own the property at [address]?**

Yes

No

Currently Selling

Comments (if currently selling)

**If yes to Qn 9**

**10. Are you experiencing any difficulties in making your mortgage repayments?**

Yes

No

Other (please specify)

**11. At the moment, are you up to date with your mortgage payments?**

Yes (GO TO Q13)

No

**12. How many mortgage payments have you missed?**

1

2

3 or more

Other (please specify)

**13. Are you up to date with all of your other debts and bills?**

Yes

No

If no, please describe which debts (e.g. credit card)/bills and approx amounts

**14. Have you had to borrow any more money in the last [6] months since we assisted you?**

No

Yes, from a bank

Yes, from family/friends

Yes, from another source

Please specify other source

**15. In the last [6]months, have you used a credit card to pay your mortgage payments?**

Yes

No

**16. What has happened with that property?**

- They (owner) sold the property
- They (owner) in process of selling property
- The bank/lender sold property
- The bank/lender in the process of selling property
- Other

Please describe

## Current circumstances

**17. Where are you currently living? (provide relevant prompt -e.g. are you living in the same house? renting?).**

Living in same home

Staying temporarily with family/friends

Purchased elsewhere

Moved in with family/friends (longer term)

Private rental

Boarding house/caravan park

Public/community housing

Homeless

Other (please specify)

**18. Have there been any other major changes in your circumstances in the last [6] months? (e.g., relationships, family, employment, health, other) (Prompt: anything else?)**

**19. Overall, would you say that you feel more in control of your financial situation, less in control or about the same as [6] months ago when your file was closed?**

More in control

Less in control

The same/stable

Please describe/explain

## Advice and assistance given

**20. Turning to the advice and assistance you were given by Legal Aid/CCLC. When you first contacted us, what type of assistance were you HOPING to receive?**

- |   |   |
|---|---|
| <input type="checkbox"/> Help to save my house (general)  | <input type="checkbox"/> Help writing letters/documents |
| <input type="checkbox"/> Advice                           | <input type="checkbox"/> Help at court/representation   |
| <input type="checkbox"/> Help negotiating with the lender | <input type="checkbox"/> Other                          |
| <input type="checkbox"/> Help accessing superannuation    |   |

Please describe

**21. What type of advice or help were you given? (prompt: anything else?)**

- |   |   |
|---|---|
| <input type="checkbox"/> Help to save my house (general)  | <input type="checkbox"/> Help writing letters/documents |
| <input type="checkbox"/> Advice                           | <input type="checkbox"/> Help at court/representation   |
| <input type="checkbox"/> Help negotiating with the lender | <input type="checkbox"/> Other                          |
| <input type="checkbox"/> Help accessing superannuation    |   |

Please describe

**22. Do you think that the assistance given helped you to resolve your mortgage/housing situation?**

- yes, helped resolve it       No, made no difference       No, made it worse

please describe

**23. Did the assistance given help you in any other way (e.g., reduce stress levels, help you with financial planning )?**

- Yes helped to reduce stress levels
- Yes helped to put me back of control of financial situation
- Yes, other
- No

If yes, can you give me an example of how else it has helped you?

**24. If you were to experience any further difficulties with your mortgage now, what do you think you would do about it?**

- Nothing
- Take action myself (deal with lender etc)
- Seek help (where?)

Please describe

**25. Is there anything else you would like to say about the legal service or the help you were given?**

## Thank you

Thanks very much for your time. That is the end of the survey.

If you need any further legal assistance about mortgage or money issues, please feel free to contact the credit and debit hotline (1800 808 488) or LawAccess NSW (1300 888 529) .

### 26. Interview Date

DD MM YYYY  
Today's date  /  /

### 27. Assisted by:

CCLC

Legal Aid