

INSTRUCTIONS : PLEASE DOWNLOAD AND FILL UP THE FORM

Date and Time of Interview
Referred by
Broker Name

Your Personal Details								
	Applicants 1				Applicant 2			
Family Name								
Given Name								
Title								
Previous Name								
Gender								
Date Of Birth								
Marital Status								
Dependents								
Mother Maiden Name								
Are You a PR?	Yes	No			Yes	No		
Drivers License No	NO	Exp.	State		NO	Exp.	State	
Contact Details	Ph. No				Ph.no			
	E-mail				E-mail			
Residential Address								
Date Moved In								
Housing Status	Own Home	Renting	With parents	Other	Own Home	Renting	With parents	Other
*Previous Residential Addresses if less than 3 years								
Residential Address								
Date Moved In								
Date Moved Out								

Your Employment Details

Occupation						
Employer's Name and ABN						
Employer's Address						
Contact Person						
Contact Number						
Role description						
Employment Type	PAYG	Self- Employed	Other (Details)	PAYG	Self-Employed	Other (Details)
Employment Basis	Full Time	Part Time	Other (Details)	Full Time	Part Time	Other (Details)
Date Commenced						
Gross Income						
Rental Income						
Other Incomes						

Previous Employment (if less than three years)

Occupation						
Employer's Name						
Employer's Address						
Contact Person						
Contact Number						
Employment Type	PAYG	Self – Employed	Other	PAYG	Self – Employed	Other
Employment Basis	Full Time	Part Time	Other	Full Time	Part Time	Other
Start Date						
Finish Date						

Your Business Details (if applicable)

Business Name		
Business Address		
Are you a sole trader?	Yes	No
Are you the director of a company?	Yes	No
Company Name		
Company Address		
Are you the Trustee of a Trust?	Yes	No
Trust's Name		
Does the business have any borrowings?	Yes	No
If so would you like these arrangements reviewed?	Yes	No

MONTHLY LIVING EXPENSES

PARTICULARS	Monthly Expenses
Utilities and Rates Owner Occupied Property	
Utilities and Rates Investment Property	
Telephone, Internet, Pay TV & Streaming Services	
Groceries	
Recreation & Entertainment	
Clothing and Personal Care	
Medical and Health (Excluding Health Insurance)	
Transport	
Education	
Childcare	
Insurance	
Others	
Total	

Remarks :

Applicant Name	Applicant Name
Sign Applicant 1	Sign Applicant 2

Your Statement of Position

Assets		Liabilities			Monthly Repayment
Savings Accounts Financial Institutions	Current Value	Credit Lines - Financial Institution	Limit	Amount Owing	Repayment Years
Real Estate Addresses	Current Value	Home Loans – Financial Institution	Limit	Amount Owing	Repayment
Motor Vehicles Make & Year	Current Value	Credit Card - Financial Institution	Limit	Amount Owing	Repayment
Superannuation	Current Value	Personal Loans - Financial Institution	Expiry Date	Amount Owing	Repayment
Home Contents	Current Value	Others			
Total Assets		Total Liabilities			

Life Insurance Sum Insured	1		
	2		

Do you expect any changes to your net asset position in the foreseeable future?

Notes :

NAME OF THE APPLICAN 1	NAME OF THE APPLICAN 1
SIGNATURE OF APPLICANT 1	SIGNATURE OF APPLICANT 1

Further Information

Loan Structure Discussed	
1. Loan Amount 1: Loan Amount 2:	
2. OEV:	
3. Loan Term:	
4. Repayment:	
5. Loan Type:	
6. Product chosen:	
7. Bank:	
8. Company Registered in your name:	
9. LMI:	
10. Interest Rate:	
11. FTC:	
12. Finance Clause Expiry	
13. Settlement Date	
14. Security Address	
15. Property Type :	
16. ABS purpose :	

Please write comments of the application

Please write description of the application

Please write comments of the application

What is the reason for selecting fixed/variable/split?

Are there any additional requirements?

What is the reason for cash out?

What is the reason for servicing to fail?

Please elaborate living expenses?

Are there any bank notes?

LIST OF DOCUMENTS

Types of Documents	Documents Needed	Location	Bank Docs
ID Documents			
Income Documents			
Refinance Statement			
Contract of Sale			
Building Contract			
Genuine Savings			
Funds to Complete			
Comments			
Servicing			
Fact Find Signed			
Liability Limit Proof			
Rates Notice			
Other Documents			

Professional Advisers

	Financial Planner	Solicitor /Conveyancer	Real Estate Agent	Accountant
Name:				
Mobile:				
Work:				
Fax:				
E-mail				

Declaration & Acknowledgement

	I / We declare that we have reviewed this document and confirm the information contained within is complete and accurate to the best of my / our knowledge.		
	I / We understand that the factual information contained within this document is relied upon in making a preliminary assessment. I / We declare that we have received a copy of the Credit Guide & Privacy Act for my/our records.		
	I / we hereby declare that the information provided is true and correct.		
	I / we understands that rates and fees are subject to change without notice. Different rates may apply for deposits lodged by financial institutions. Full terms and conditions are available on application. Bank and Government charges may apply.		
	I / we understand that in case of an upfront valuation, any fees and charges raised by the financial institution to the loan writer will be reimbursed by the applicant to the loan writer.		
	I / we understand that in case of early closure of loan amount, any fees and charges raised by the financial institution to the loan writer will be reimbursed by the applicant to the loan writer.		
	All the products are chosen after full consideration and under no pressure of broker and whosoever.		
	I / we have provided our consent to apply home loan and understands that there will be a credit check on my file.		
	I / we have carefully checked the Assets & Liabilities that are declared in the application and confirm the details to be correct.		
	I have checked the living expenses declared and find them correct.		
	I have provided income documents provided in the application and I am comfortable for my employer to be contacted for further verification.		
Applicant 1		Applicant 2	
Signature:		Signature:	
Date:		Date:	