

A. PERSONAL DETAILS - APPLICANT 1

Mr
 Ms
 Mrs
 Miss
 Dr
 Other

Surname

First Name
 Middle Name

Date of Birth (DOB)
 Citizenship

Drivers Licence Number
 Drivers Licence Expiry Date

Marital Status
 Mother's Maiden Name

Number of Dependants
 Ages of Dependants

Nearest Relative not Living with you (Name, Number, Relationship & Address)

A. PERSONAL DETAILS - APPLICANT 2

Mr
 Ms
 Mrs
 Miss
 Dr
 Other

Surname

First Name
 Middle Name

Date of Birth (DOB)
 Citizenship

Drivers Licence Number
 Drivers Licence Expiry Date

Marital Status
 Mother's Maiden Name

Number of Dependants
 Ages of Dependants

Nearest Relative not Living with you (Name, Number, Relationship & Address)

B. ADDRESS DETAILS - APPLICANT 1

Current Residential Address

Current Residential Address Status
 Own
 Mortgaged
 Renting
 Boarding
 Other

Start Date at Current Address
 Mobile

Email Address

Previous Residential Address (if less than 3 years at current)

Start Date at Previous Address

B. ADDRESS DETAILS - APPLICANT 2

Current Residential Address (write 'COPY' if details are the same as Applicant 1)

Current Residential Address Status
 Own
 Mortgaged
 Renting
 Boarding
 Other

Start Date at Current Address
 Mobile

Email Address

Previous Residential Address (if less than 3 years at current)

Start Date at Previous Address

C. EMPLOYMENT DETAILS - APPLICANT 1

Current Employment
 Employee
 Self-employed
 Full Time
 Part Time
 Casual

Start Date of Current Employment
 Occupation

Employer Business Name or ABN
 Employer Phone Number

Previous Employment (if in current for less than 3 years)
 Employee
 Self-employed
 Full Time
 Part Time
 Casual

Start Date of Previous Employment
 Occupation

Employer Business Name or ABN

C. EMPLOYMENT DETAILS - APPLICANT 2

Current Employment
 Employee
 Self-employed
 Full Time
 Part Time
 Casual

Start Date of Current Employment
 Occupation

Employer Business Name or ABN
 Employer Phone Number

Previous Employment (if in current for less than 3 years)
 Employee
 Self-employed
 Full Time
 Part Time
 Casual

Start Date of Previous Employment
 Occupation

Employer Business Name or ABN

D. GROSS MONTHLY INCOME - APPLICANT 1

Employment (pre-tax)	\$	<input type="text"/>	Investment/Shares	\$	<input type="text"/>
Total Rent Received	\$	<input type="text"/>	DSS/Other	\$	<input type="text"/>

D. GROSS MONTHLY INCOME - APPLICANT 2

Employment (pre-tax)	\$	<input type="text"/>	Investment/Shares	\$	<input type="text"/>
Total Rent Received	\$	<input type="text"/>	DSS/Other	\$	<input type="text"/>

E. MONTHLY EXPENSES - APPLICANT 1&2

Utilities & Rates	\$	<input type="text"/>	Food & Groceries	\$	<input type="text"/>	Medical & Health	\$	<input type="text"/>	Child Care	\$	<input type="text"/>	House Purchase & Maintenance	\$	<input type="text"/>
Rental Expense	\$	<input type="text"/>	Recreation & Entertainment	\$	<input type="text"/>	Transport	\$	<input type="text"/>	Child Maintenance	\$	<input type="text"/>	Insurance (home, personal and car)	\$	<input type="text"/>
Telephone, Internet & PayTV	\$	<input type="text"/>	Clothing & Personal Care	\$	<input type="text"/>	Education	\$	<input type="text"/>	Sport & Hobbies	\$	<input type="text"/>	Other	\$	<input type="text"/>

F1. REAL ESTATE ASSETS - APPLICANT 1&2

Home	Address	Est. Value \$	Ownership	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Investment 1	Address	Est. Value \$	Monthly Rent \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment 2	Address	Est. Value \$	Monthly Rent \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment 3	Address	Est. Value \$	Monthly Rent \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Investment 4	Address	Est. Value \$	Monthly Rent \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

G1. REAL ESTATE LIABILITIES - APPLICANT 1&2

Home Loan Lender	Balance \$	Rate %	Repayment \$	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment \$	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment \$	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment \$	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment \$	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

F2. OTHER ASSETS - APPLICANT 1&2

Vehicle 1	Make/Model/Year	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vehicle 2	Make/Model/Year	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings	Account/Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings	Account/Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings	Account/Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Savings	Account/Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Contents	Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Superfund/SMSF	Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Superfund/SMSF	Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Shares	Details	Est. Value \$	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

G2. OTHER LIABILITIES - APPLICANT 1&2

Vehicle Loan Lender	Repayment \$	Balance \$	Rate %	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Vehicle Loan Lender	Repayment \$	Balance \$	Rate %	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Personal Loan Lender	Repayment \$	Balance \$	Ownership	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
SMSFLoan Lender	Repayment \$	Balance \$	Rate %	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
SMSFLoan Lender	Repayment \$	Balance \$	Rate %	Refinance
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
HECS/HELP Debt	Repayment \$	Balance \$	Ownership	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

H. REQUIREMENTS & OBJECTIVES - APPLICANT 1 & APPLICANT 2

Please state primary reasons for seeking loan?

[Empty text box for primary reasons for seeking loan]

If purchasing: funds required to complete loan

Security Property Value \$ []

Savings \$ []

Stamp Duty \$ []

Deposit Paid \$ []

Conveyancer Fees \$ []

Gifts and Other \$ []

Any Other Fees \$ []

TOTAL CONTRIBUTIONS (B) \$ []

TOTAL COSTS (A) \$ []

TOTAL LOAN REQUIRED (A-B) \$ []

I. DESIRED LOAN FEATURES - APPLICANT 1 & APPLICANT 2

- Variable Rate, Fixed Rate, Combined, Variable & Fixed, Interest Only, Offset Account, Internet Banking, Redraw, Credit Card, Portability, Line of Credit, Additional Repayments, Loan Variations

Any preferred lenders? Any lenders you do not wish to deal with? Preferred loan splits?

[Empty text box for preferred lenders and splits]

J. YOUR FINANCIAL SECURITY - APPLICANT 1 & APPLICANT 2

- Have you ever had any financial judgments or legal proceedings against you?
Did you have any difficulty meeting your financial commitments in the past 2 years?
Are any of your existing debts currently in arrears?
Are you concerned about rising interest rates? How concerned are you?
Do you expect any significant changes to your financial situation in the foreseeable future that would adversely impact your ability to meet your commitments? How do you expect to meet your commitments?

If any applicants answered 'YES' to any of the questions above, please provide details below:

[Empty text box for details of 'YES' answers]

K. PROTECTING YOUR LIFESTYLE - APPLICANT 1 & APPLICANT 2

- Do you have any insurance to protect your lifestyle eg.life, total permanent disablement insurance, income protection, etc?
If No, how would your lifestyle needs be maintained if you and/or your partner were:
a) Temporarily unable to earn an income, for example through sickness/illness?
b) Permanently unable to earn income, for example through death/permanent disability?

[Empty text box for lifestyle maintenance details]

- Would you like someone to contact you regarding life insurance?
Do you have home and contents insurance?
Have you received advice from an accountant, solicitor or financial planner regarding your requirements or financial objectives? If Yes, please provide details:

[Empty text box for advice received details]

L. OTHER ADVISORS - APPLICANT 1&2

Accountant Business Name, Accountant Name, Contact Number, Solicitor/Conveyancer Business Name, Solicitor/Conveyancer Name, Contact Number, Real Estate Agency, Agent Name, Contact Number

I/We agree that my/our broker may keep the above parties updated about progress of my/our loan application.