

# Application Form

## PERSONAL DETAILS

### Person 1

Surname

First names

Address

Date of Birth  /  /

Email Address

Home Phone

Work Phone

Mobile Phone

### Person 2

Surname

First names

Address

Date of Birth  /  /

Email Address

Home Phone

Work Phone

Mobile Phone

## ABOUT THIS LOAN

### Purpose

- First home
- Re financing
- Investment Property
- Building
- Home Improvements
- Debt consolidation
- Monthly Income/Equity Release
- Other

Notes

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### Source of deposit

- Access to own funds
- Equity with Property
- Family Loan/extra security
- Gift
- Other

Notes

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## YOUR CURRENT FINANCIAL POSITION

### Your family home

	Person 1	Person 2	Notes
Proposed/Present value	\$ <input type="text"/>	\$ <input type="text"/>	<hr/> <hr/>
Proposed/Current mortgage	\$ <input type="text"/>	\$ <input type="text"/>	<hr/> <hr/>
Mortgage term remaining	Years <input type="text"/>	Years <input type="text"/>	<hr/> <hr/>
Name of Lender	<input type="text"/>	<input type="text"/>	<hr/> <hr/>

### Other property or land owned or partly owned

	Property 1	Property 2	Property 3	Property 4
Proposed/Present value	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Ownership Self/Partner/Joint	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Current mortgage	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Mortgage term remaining	Years <input type="text"/>	Years <input type="text"/>	Years <input type="text"/>	Years <input type="text"/>
Name of Lender	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Notes

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## INCOME AND OCCUPATION

### Person 1

Occupation

Employer's Name

Employed or Self Employed

Interest Income \$  pa  gross  net

Earned Income/Drawings \$  pa  gross  net

Other Income \$  pa  gross  net

Notes

### Person 2

Occupation

Employer's Name

Employed or Self Employed

Interest Income \$  pa  gross  net

Earned Income/Drawings \$  pa  gross  net

Other Income \$  pa  gross  net

Notes

## DO YOU HAVE ANY ADVERSE CREDIT HISTORY?

### Person 1

No  Yes *If Yes, please give details below*

### Person 2

No  Yes *If Yes, please give details below*

## LIABILITIES

### Person 1

Loans excluding mortgage

Credit Cards	Hire Purchase
\$ <input type="text"/>	\$ <input type="text"/>
Personal Loans	Student Loans
\$ <input type="text"/>	\$ <input type="text"/>

Notes

### Person 2

Loans excluding mortgage

Credit Cards	Hire Purchase
\$ <input type="text"/>	\$ <input type="text"/>
Personal Loans	Student Loans
\$ <input type="text"/>	\$ <input type="text"/>

Notes

## TAILORING YOUR LOAN

### Lender Preference

Are there any lenders that you particularly like or don't like to deal with?

### What mortgage or bank features are important to you?

- |  |  |
|--|--|
| <input type="checkbox"/> Interest Rates                        | <input type="checkbox"/> Lo Doc Loans      |
| <input type="checkbox"/> Flexibility                           | <input type="checkbox"/> Telephone Banking |
| <input type="checkbox"/> Pay o Quickly (extra repayments)      | <input type="checkbox"/> Internet banking  |
| <input type="checkbox"/> Interest Only                         | <input type="checkbox"/> Text banking      |
| <input type="checkbox"/> Redraw                                | <input type="checkbox"/> Branch support    |
| <input type="checkbox"/> Top Up ability                        | <input type="checkbox"/> Foreign exchange  |
| <input type="checkbox"/> Fixed Rates                           | <input type="checkbox"/> Business accounts |
| <input type="checkbox"/> Lending for credit impaired borrowers | <input type="checkbox"/> Overdraft         |
| <input type="checkbox"/> O set Facility                        | <input type="checkbox"/> Credit card       |

Other/Notes

### Your goals

Do you have any short, medium, or long term goals that might be relevant for this loan?

If there is further information that you think is relevant to a proper assessment of your financial situation?



### YOUR PROFESSIONAL CONTACTS

#### Do You Have

- Solicitor
- Accountant
- Financial Advisor
- Insurance Broker
- Real Estate Agent

Notes

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#### Your Will

Have you made a Will?

- Person 1  Yes    Person 2  Yes  
 No                       No

### PRELIMINARY RECOMMENDATION

Lender

Loan Type

Links to client circumstances and requirements

Links to lender's criteria

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### SIGNATURE

#### Person 1

Date

Signed

#### Person 2

Date

Signed

#### Advisor

Date

Signed