

1

First Applicant Details

First Name

Middle Name

Last Name

Home Phone

Work Phone

Mobile Phone

Email Address

Maiden Name (if name has changed)

Date of Birth

Ages of Dependents (eg: 3,6,11,14)

☐ Single☐ Married☐ DeFacto

Contact Preferences: Applicant 1 | Applicant 2 | After Hours | Mobile | Work | Home

Address – 5 Year History

Current Address

<input type="text"/>	
<input type="text"/>	<input type="text"/>

Date Moved In

☐ Own Home ☐ Renting

Previous Address (If < 5 years at above)

<input type="text"/>	
<input type="text"/>	<input type="text"/>

Date Moved In

Date Moved Out

☐ Own Home ☐ Renting

 Postal Address
(If Different) ▶

<input type="text"/>	<input type="text"/>
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NOTE: if you have not given 5 years, more history should be added on page 7.

Employment Details – 5 Year History

Current Position

☐ Full Time☐ Part Time☐ Casual

Start Date	Role	Industry
Contact Person	Company Name	Phone
Address		Annual Income

If less than 5 years at the above position:

Previous Position

☐ Full Time☐ Part Time☐ Casual

Start Date	Role	Industry
Contact Person	Company Name	Phone
Address		Annual Income

NOTE: if you have not given 5 years, more history should be added on page 7.

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Second Applicant Details

First Name

Middle Name

Last Name

Home Phone

Work Phone

Mobile Phone

Email Address

Maiden Name (if name has changed)

Date of Birth

☐ Single
☐ Married
☐ DeFacto

*** Ages of Dependents – ONLY if different from Applicant 1

Address – 5 Year History

☐ Same as First Applicant **OR** Fill in the details below

Current Address

<input type="text"/>	
<input type="text"/>	<input type="text"/>

Date Moved In

☐ Own Home ☐ Renting

Previous Address (If < 5 years at above)

<input type="text"/>	
<input type="text"/>	<input type="text"/>

Date Moved In

Date Moved Out

☐ Own Home ☐ Renting**NOTE:** if you have not given 5 years, more history should be added on page 7.

Employment Details – 5 Year History

Current Position

☐ Full Time☐ Part Time☐ Casual

Start Date

Role

Industry

Contact Person

Company Name

Phone

Address

Annual Income

If less than 5 years at the above position:

Previous Position

☐ Full Time☐ Part Time☐ Casual

Start Date

Role

Industry

Contact Person

Company Name

Phone

Address

Annual Income

NOTE: if you have not given 5 years, more history should be added on page 7.

New Purchase

Solicitor Firm	Name	Phone	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Real Estate Agency	Agent Name	Mobile/Phone	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

To simplify things for you, we liaise with your solicitor and agent to keep them updated.

Your solicitor will be sent loan details to help them calculate figures with you.

Your agent will receive general updates without specific amounts or details.

Do you consent to this? ☐ Yes ☐ No

Will you be moving into the property that you are purchasing ☐ Yes ☐ No

Property Condition

An **independent valuation** will be done on the property.

Is there anything that could affect the valuation on the property such as rural zoning, acreage or the property is less than 40 square metres? ☐ No ☐ Maybe ☐ Yes

Company or Trust

Are you buying in the name of a company or trust? **If yes:**

Entity Name:

☐ We will need a copy of the trust deed or company registration

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Assets, Liabilities, Income and Expenses

Assets

Savings/Bank	Account #	Amount		
			Home Contents (Estimate)	
			Superannuation (Approximate)	
			Life Insurance	

Car/s (Make)	Year Model	Value	Other major assets	Value

Liabilities/Debts

Credit Cards (Bank)	CC Number	Limit	Amount Owing	<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing

Personal Loans (Bank/Institution)	Limit	Amount Owing	Monthly Pmt	<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing

Business Loans/Leases/Overdrafts (Bank/Institution)	Limit	Amount Owing	Monthly Pmt	<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing
				<input type="checkbox"/> Closing

HECS or HELP or Other Debt	Amount Owing	Monthly Pmt

Other Income and Expenses

Work Income (p.a)		Rent Per Week	
Government Benefits (fortnightly)		Monthly Living Expenses	
		(eg. food/entertainment and everything not listed above)	

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Existing Property and Loans

Existing Property

Addresses for your existing properties	Approximate Purchase Date	House/Unit/Land	Value	Rental Income

Existing Home Loans

Home Loans (Bank/Institution)	Amount Owing	Monthly Pmt	Limit

Loan Repayment Preferences

Repayment

- ☐ Monthly
☐ Fortnightly
☐ Weekly (if available)

Repayments will initially be direct debited from a savings account. Later you can change this.

Your savings account details

Bank	BSB	Account
In the Name of		Branch

Identification

Required only if you have not provided a copy of your drivers licence to us

Drivers Lic No	Expiry Date	Date of Birth	Second Applicant	Expiry Date	Date of Birth

Nearest Relative not Living With You

Name (for Applicant 1)	Relationship	Name (for Applicant 2)	Relationship
Address		Address	
Phone		Phone	
Mothers Maiden Name (Applicant 1)		Mothers Maiden Name (Applicant 2)	

Your Credit History

Important: the chosen lender **will** check your credit file as part of this application. It is important to let us know:

- If you have any defaults or judgments on your credit file for the last five years
- If you have been behind or overdue on any loans or credit cards for the last six months
- If you have/are applying for any loan in the last month

If any of the above applies to you please provide details below

✕

Signature of Applicant 1
(Handwritten Forms Only)

✕

Signature of Applicant 2
(Handwritten Forms Only)

Additional Address/Employment History

The information below is **only** if you ran out of address history or employment history on page 1/2.

Extra Addresses – 5 Year History required in Total

Previous Address for: ☐ Applicant 1 ☐ Applicant 2

Date Moved In Date Moved Out

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☐ Own Home ☐ Renting

Previous Address for: ☐ Applicant 1 ☐ Applicant 2

Date Moved In Date Moved Out

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☐ Own Home ☐ Renting

Previous Address for: ☐ Applicant 1 ☐ Applicant 2

Date Moved In Date Moved Out

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☐ Own Home ☐ Renting

Extra Employment - 5 Year History required in Total

Previous Position for: ☐ Applicant 1 ☐ Applicant 2 ☐ Full Time ☐ Part Time ☐ Casual

Start Date	Role	Industry
Contact Person	Company Name	Phone
Address		Annual Income

Previous Position for: ☐ Applicant 1 ☐ Applicant 2 ☐ Full Time ☐ Part Time ☐ Casual

Start Date	Role	Industry
Contact Person	Company Name	Phone
Address		Annual Income

Previous Position for: ☐ Applicant 1 ☐ Applicant 2 ☐ Full Time ☐ Part Time ☐ Casual

Start Date	Role	Industry
Contact Person	Company Name	Phone
Address		Annual Income