Fact Find



Goals Your goals

What are you looking to do?

Purchase

- First home
- Next home
- Investment
- Commercial
- Industrial

Refinance

- Get a better deal
- Renovate
- Consolidate debt
- Reverse mortgage
- Borrow extra funds
- Personal loan

(Optional) If your situation is complex, tell your loan expert about it here. *E.g. you want to buy a new property and refinance at the same time.*

Are there any important dates you're working towards?

Settlement date

Finance date

Auction date

Applicants Your details

Full name	Date of Birth
	DD MM YY
Email	Mobile
Marital Status	Gender
Single Married Defacto	Male Female Prefer not to say
Separated Divorced Widowed	
Mother's maiden name	
Preferred name (Optional)	Previous name (Optional)
Current home address	
Mailing address Same as home address	
Are you a citizen and permanent resident of Australia? 🛛 Yes	No
If you answered no:	
What country are you a citizen of?	What country are you a resident of?
What's your residency status?	
Permanent Resident Temporary Resident Non-res	sident

Applicants Your household

What best describes your current household?

Single - no children	
Single - with dependent children	Dependent name & age
	Dependent name & age
	Dependent name & age
Couple - no children	Partner's first name
Couple - with dependent children	Partner's first name
	Dependent name & age
	Dependent name & age
	Dependent name & age

Applicants Person co-applicant

Full name	Date of Birth
	DD MM YY
Email	Mobile
Marital Status	Gender
Single Married Defacto Separated Divorced Widowed	Male Female Prefer not to say
Mother's maiden name	
Preferred name (Optional)	Previous name (Optional)
Current home address	
Mailing address Same as home address	
Is the co-applicant a citizen and permanent resident of Australia?	Yes No
If you answered no:	
What country is he/she a citizen of?	What country is he/she a resident of?
What's is his/her residency status?	
Permanent Resident Temporary Resident Non-re	sident

Applicants Company/trust co-applicant

Business name

Office address	
Office phone number	Office email
Organisation tax number	Organisation company number
Description	

Properties Your home

Do you own, rent, board, or live with parents?

App	licant 1:		Ар	plicant 2:	
				Same as applicant 1	
	Own What type of property? Industrial Residential Address	🗌 Rural 🔲 Commercial		Own What type of property? Industrial Residential Address	🗌 Rural 🔲 Commercial
	When did you move in?			When did you move in?	
	ММ	YY		ММ	YY
	Estimated property value		Estimated property value		
	\$			\$	
	Are you paying off a mortgage? If you answered yes: Which lender are you with?	Yes No		Are you paying off a mortgage? If you answered yes: Which lender are you with?	Yes No
	Remaining mortgage amount	Repayment schedule		Remaining mortgage amount	Repayment schedule
	\$			\$	
	Repayment amount			Repayment amount	
	\$	Is interest tax deductible?		\$	Is interest tax deductible?
	Rent Address			Rent Address	
	When did you move in?			When did you move in?	
	MM	YY		MM	ҮҮ
	Boarding Address			Boarding Address	
	When did you move in?		When did you move in?		
	MM	YY		MM	YY
Living with parents Address			Living with parents Address		
	When did you move in?			When did you move in?	
	ММ	YY		ММ	YY
	`				

Properties To purchase

What will this property be used for?

Home Have you found a property you want to buy?
Yes No
What kind of property?
Newly constructed home To be built An established home Vacant land to build new home
What type of property?
Industrial Residential Rural Commercial
If you answered yes above, what suburb is the property located in? If you answered no, what state will the property be in?
How much do you expect the property to cost?
\$
Investment Have you found a property you want to buy? Yes No What kind of property? Newly constructed home To be built An established home Vacant land to build new home
What type of property?
Industrial Residential Rural Commercial
If you answered yes above, what suburb is the property located in? If you answered no, what state will the property be in?
How much do you expect the property to cost?
\$
Will this property generate rental income?
Yes No
If yes, what is the estimated monthly rental income?
\$

Properties Other properties

o you own a residential	property? Yes	No
Detailed type Apt unit flat Terrace	Fully detached houseProperty development	
Address		Estimated value of property
		\$
If paying a mortgage, _l	please complete the following	fields:
Lender		Remaining mortgage amount
		\$
Monthly repayment a	nount	Is interest tax deductible?
\$		
Are you going to refina	ance this mortgage?	If no, will you be using this property as security?
Yes	No	Yes No
Does this property ger		If yes, what is the monthly rental income?
Yes	No	\$
Detailed type Apt unit flat Terrace		
Other:		
Address		Estimated value of property
		\$
If paying a mortgage, _l	please complete the following	fields:
Lender		Remaining mortgage amount
		\$
Monthly repayment ar	nount	Is interest tax deductible?
\$		Yes No
Are you going to refina		If no, will you be using this property as security?
Yes	No	Yes No
Does this property ger	nerate rental income?	If yes, what is the monthly rental income?
Yes	No	\$

Properties Other properties

Detailed type	
Non-specialised industrial Light industrial	Other
Address	Estimated value of property
	\$
If paying a mortgage, please complete the following fields:	
Lender	Remaining mortgage amount
	\$
Nonthly repayment amount	Is interest tax deductible?
\$	Yes No
Are you going to refinance this mortgage?	If no, will you be using this property as security?
Yes No	Yes No
Does this property generate rental income?	If yes, what is the monthly rental income?
Yes No	\$
	2
You own a rural property? Yes No Detailed type	
	n 40 🗌 Over 40 hectares
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than	
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than Address	n 40 Over 40 hectares Estimated value of property
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than Address If paying a mortgage, please complete the following fields:	n 40 Over 40 hectares Estimated value of property \$
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than Address If paying a mortgage, please complete the following fields:	n 40 Over 40 hectares Estimated value of property
You own a rural property? Yes No Detailed type Shectares or less Over 8 hectares but less than Address Over 8 hectares or less If paying a mortgage, please complete the following fields: Lender	n 40 Over 40 hectares Estimated value of property \$ Remaining mortgage amount \$
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than	n 40 Over 40 hectares Estimated value of property \$ Remaining mortgage amount
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than Address If paying a mortgage, please complete the following fields: Lender Monthly repayment amount \$	n 40 Over 40 hectares Estimated value of property \$ Remaining mortgage amount \$ Is interest tax deductible? Yes No
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than Address If paying a mortgage, please complete the following fields: Lender Monthly repayment amount \$	n 40 Over 40 hectares Estimated value of property \$ Remaining mortgage amount \$ Is interest tax deductible?
You own a rural property? Yes No Detailed type 8 hectares or less Over 8 hectares but less than Address If paying a mortgage, please complete the following fields: Lender Monthly repayment amount \$ Are you going to refinance this mortgage?	n 40 Over 40 hectares Estimated value of property \$ Remaining mortgage amount \$ Is interest tax deductible? Yes No If no, will you be using this property as security?

Properties Other properties

Do you own a commercial property? 🗌 Yes 🛛	No
Detailed type Prof chambers Offices Warehouse Vacant Land Residential commercial Other:	 Factory Retirement Village Non-specialised commercial
Address	Estimated value of property
	\$
If paying a mortgage, please complete the followir	ng fields:
Lender	Remaining mortgage amount
	\$
Monthly repayment amount	ls interest tax deductible?
\$	Yes No
Are you going to refinance this mortgage?	If no, will you be using this property as security?
Yes No	Yes No
Does this property generate rental income?	If yes, what is the monthly rental income?
Yes No	\$

Notes

Financial position Assets

Please complete the fields below if you own the following asset/s:

Applicant 1:		Applicant 2:			
Motor Vehicle 1		Motor Vehicle 1			
Make	Year	Make	Year		
Value		Value			
\$		\$			
Description (optional)		Description (optional)			
Motor Vehicle 2		Motor Vehicle 2			
Make	Year	Make	Year		
Value		Value			
\$		\$			
Description (optional)		Description (optional)			
Boat Value		Boat Value			
\$		\$			
Description (optional)		Description (optional)			
Savings		Savings			
Value		Value			
\$		\$	\$		
Description (optional)		Description (optional)			
Bonds		Bonds Value			
Value					
\$			\$		
Description (optional)		Description (optional)			
Managed funds Value		Managed funds Value			
\$		\$			
Description (optional)		Description (optional)			

Financial position Assets

Please complete the fields below if you own the following asset/s:

Applicant 1:	Applicant 2:
Shares	Shares
Value	Value
\$	\$
Description (optional)	Description (optional)
Cash Value	Cash Value
\$	\$
Description (optional)	Description (optional)
Debenture charge Value	Debenture charge Value
\$	\$
Description (optional)	Description (optional)
Cheque account Value	Cheque account Value
\$	\$
Description (optional)	Description (optional)
Cash management Value	Cash management Value
\$	\$
Description (optional)	Description (optional)
Pension account Value	Pension account Value
\$	\$
Description (optional)	Description (optional)
Term account Value	Term account Value
\$	\$
Description (optional)	Description (optional)

Financial position Assets

Please complete the fields below if you own the follo	wing asset/s:
Applicant 1:	Applicant 2:
Savings account	Savings account
Value	Value
\$	\$
Description (optional)	Description (optional)
Deposit paid Value	Deposit paid Value
\$	\$
Description (optional)	Description (optional)
Furniture Value	Furniture Value
\$	\$
Description (optional)	Description (optional)
Superannuation Value	Superannuation Value
\$	\$
Description (optional)	Description (optional)
Goodwill	Goodwill
Value	Value
\$	\$
Description (optional)	Description (optional)
Home contents Value	Home contents Value
\$	\$
Description (optional)	Description (optional)
Receivables	Receivables
Value	Value
\$	\$
Description (optional)	Description (optional)

Financial position Assets

Please complete the fields below if you own the foll	owing asset/s:
Applicant 1:	Applicant 2:
Equity	Equity
Value	Value
\$	\$
Description (optional)	Description (optional)
Tools of trade	Tools of trade
Value	Value
\$	\$
Description (optional)	Description (optional)
Stock machinery	Stock machinery
Value	Value
\$	\$
Description (optional)	Description (optional)
Collections	Collections
Value	Value
\$	\$
Description (optional)	Description (optional)
Charge over cash Value	Charge over cash Value
\$	\$
Description (optional)	Description (optional)
Guarantee	Guarantee
Value	Value
\$	\$
Description (optional)	Description (optional)
Gifts Value	Gifts Value
\$	\$
Description (optional)	Description (optional)

Financial position Assets

Please complete the fields below if you own the following asset/s:

Applicant 1:	Applicant 2:
Time share	Time share
Value	Value
\$	\$
Description (optional)	Description (optional)
Life insurance	Life insurance
Value	Value
\$	\$
Description (optional)	Description (optional)
Other	Other
Value	Value
\$	\$
Description (optional)	Description (optional)

Financial position Liabilities

Applicant 1:		Applicant 2:	
Credit Card		Credit Card	
Creditor	Current balance	Creditor	Current balance
\$	\$	\$	\$
Total card limit	Total monthly repayments	Total card limit	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Charge card		Charge card	
Creditor	Current balance	Creditor	Current balance
\$	\$	\$	\$
Total card limit	Total monthly repayments	Total card limit	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	

Financial position Liabilities

Applicant 1:		Applicant 2:	
Store card		Store card	
Creditor	Current balance	Creditor	Current balance
\$	\$	\$	\$
Total card limit	Total monthly repayments	Total card limit	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Car loan Current balance	Total monthly repayments	Car loan Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Personal loan		Personal loan	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Sudent loan		Sudent loan	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
ATO Centrelink Debt Current balance	Total monthly repayments	ATO Centrelink Debt Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Outstanding tax		Outstanding tax	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	

Financial position Liabilities

Applicant 1:		Applicant 2:	
Contingent liability		Contingent liability	
Creditor	Current balance	Creditor	Current balance
\$	\$	\$	\$
Total card limit	Total monthly repayments	Total card limit	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Court ruled child maintenar Current balance	nce Total monthly repayments	Court ruled child mainter	nance Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Court ruled other debt		Court ruled other debt	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Line of credit		Line of credit	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Lease Current balance	Total monthly repayments	Lease Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Loan as guarantor	Tatalance del second	Loan as guarantor	Teleforentil
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	

Financial position Liabilities

Applicant 1:		Applicant 2:	
Loan		Loan	
Creditor	Current balance	Creditor	Current balance
\$	\$	\$	\$
Total card limit	Total monthly repayments	Total card limit	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Overdraft		Overdraft	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Term loan		Term loan	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$
Description (optional)		Description (optional)	
Other		Other	
Current balance	Total monthly repayments	Current balance	Total monthly repayments
\$	\$	\$	\$

Financial position

e		Salary/Wage	
monthly income	Employer name	Pre-tax monthly income	Employer name
		\$	
oyer address		Employer address	
status		Job status	
Current primary job	Current secondary job	Current primary job	Current secondary job
Previous job		Previous job	
b type		Job type	
PAYG	Self-employed	PAYG	Self-employed
Retired	Home duties	Retired	Home duties
b basis		Job basis	
Full time	Part time	Full time	Part time
Contract	Temporary	Contract	Temporary
gular overtime		Regular overtime	
e-tax monthly income		Pre-tax monthly income	
e-tax monthly income		Pre-tax monthly income	
-			
; ;		\$	
tails (optional) nus/commission		\$ Details (optional) Bonus/commission Type	
pe Bonus	Commission	\$ Details (optional) Bonus/commission Type Bonus	Commission
onus/commission pe Bonus e-Tax monthly income	Commission Employer name	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income	Commission Employer name
pe Bonus	_	\$ Details (optional) Bonus/commission Type Bonus	
onus/commission pe Bonus e-Tax monthly income	_	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income	
onus/commission pe Bonus e-Tax monthly income	_	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$	
atails (optional) onus/commission pe Bonus e-Tax monthly income pholoyer address	_	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address	
<pre>bitails (optional) bitails (optional) bitails</pre>	Employer name	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address Job status	Employer name
b status Current primary job	Employer name	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address Job status Current primary job	Employer name
<pre>status Current primary job Previous job</pre>	Employer name	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address Job status Current primary job Previous job	Employer name
<pre>status current primary job b type btails current primary job b type</pre>	Employer name	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address Job status Current primary job Previous job Job type	Employer name
<pre>status current primary job b type PAYG</pre>	Employer name Employer name Current secondary job Self-employed	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address Job status Current primary job Job type PAYG	Employer name Employer name Current secondary job Self-employed
<pre>status current primary job b type PAYG Retired</pre>	Employer name Employer name Current secondary job Self-employed	\$ Details (optional) Bonus/commission Type Bonus Pre-Tax monthly income \$ Employer address Job status Current primary job Job type PAYG Retired	Employer name Employer name Current secondary job Self-employed

Financial position

Please complete the fields below if you have the following income:	
Allowance	Allowance
Туре	Туре
Car allowance Company car allowance	Car allowance Company car allowance
Work allowance Disability allowance	Work allowance Disability allowance
Pre-tax monthly income	Pre-tax monthly income
\$	\$
Details (optional)	Details (optional)
Superannuation	Superannuation
Type	Type
 Private Superannuation Pre-tax monthly income 	 Private Superannuation Pre-tax monthly income
\$	\$
Financial Institution (optional)	Financial Institution (optional)
Investment income	Investment income
Туре	Туре
Type Annuities Dividends	Type Annuities Dividends
Туре	Туре
Type Annuities Dividends	Type Annuities Dividends
Type Annuities Dividends Interest	Type Annuities Dividends Interest
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income
Type Annuities Dividends Interest Pre-tax monthly income \$	Type Annuities Dividends Interest Pre-tax monthly income \$
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income \$ Description (optional) Government payments
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income \$ Description (optional) Government payments Type
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income
Type Annuities Dividends Interest Pre-tax monthly income	Type Annuities Dividends Interest Pre-tax monthly income

Financial position

Company profit
Pre-tax monthly income
\$
Details (optional)
Other
Туре
□ Worker's compensation □ Other:
Pre-tax monthly income
\$
Details (optional)

Groceries	Amount	Frequency	Ownership
Groceries	\$. W . F . M . Y	
Other	\$. W . F . M . Y	
Total	\$ p.m		
The main house you live in	Amount	Frequency	Ownership
Electricity & Gas	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Council Rates	\$. W . F . M . Y	
Water & Sewer	\$	🗌 W 🗌 F 🗌 M 🗌 Y	

Water & Sewer	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Body Corporate	\$. W . F . M . Y	
Home Operation	\$. W . F . M . Y	
Home Repairs	\$	🗌 W 🗌 F 🗌 M 🔲 Y	
Furnishings & Electrical	\$. W . F . M . Y	
Other	\$. W . F . M . Y	
Total	\$ p.m		

Education	Amount	Frequency	Ownership
Public School Costs	\$. W . F . M . Y	
Private School Costs	\$. W . F . M . Y	
Higher Education & Vocational Training (excluding HECS/HELP)	\$. W . F . M . Y	
Other	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Total	\$. W . F . M . Y	
Medical	Amount	Frequency	Ownership
Medical & Health	\$. W . F . M . Y	
Natural Therapies	\$. W . F . M . Y	
Other	\$. W . F . M . Y	
Total	\$ p.m		
Insurance	Amount	Frequency	Ownership
Insurance Building Insurance	Amount \$	Frequency	Ownership
			Ownership
Building Insurance	\$. W . F . M . Y	Ownership
Building Insurance Contents Insurance	\$	W F M Y	Ownership
Building Insurance Contents Insurance Health Insurance	\$ \$ \$	W F M Y	Ownership
Building Insurance Contents Insurance Health Insurance Income Protection	\$ \$ \$ \$	 W F M Y W F M Y W F M Y 	Ownership
Building Insurance Contents Insurance Health Insurance Income Protection Life Insurance	\$ \$ \$ \$ \$ \$	 W F M Y W F M Y W F M Y W F M Y 	Ownership
Building Insurance Contents Insurance Health Insurance Income Protection Life Insurance Vehicle Insurance	\$ \$ \$ \$ \$ \$ \$	 W F M Y 	Ownership
Building Insurance Contents Insurance Health Insurance Income Protection Life Insurance Vehicle Insurance Other	\$ \$ \$ \$ \$ \$ \$ \$ \$	 W F M Y 	Ownership
Building Insurance Contents Insurance Health Insurance Income Protection Life Insurance Vehicle Insurance Other Total	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y W F M Y	
Building Insurance Contents Insurance Health Insurance Income Protection Life Insurance Vehicle Insurance Other Total Child Care & Support	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	 W F M Y 	

The house you rent out	Amount	Frequency	Ownership
Electricity & Gas	\$	□ W □ F □ M □ Y	
Council Rates	\$	□ W □ F □ M □ Y	
Water & Sewer	\$	□ W □ F □ M □ Y	
Body Corporate	\$	- W - F - M - Y	
Repairs & Maintenance	\$. W . F . M . Y	
Running Costs	\$		
Building Insurance	\$		
Other	\$	→ W □ F □ M □ Y	
Total	\$ p.m]	
Ongoing Rent	Amount	Frequency	Ownership
Rent	\$	□ W □ F □ M □ Y	
Board	\$	□ W □ F □ M □ Y	
Other	\$	□ W □ F □ M □ Y	
Total	\$ p.m		
Telephone & Internet	Amount	Frequency	Ownership
Home/Mobile Phone	\$	W F M Y	
Internet, Pay TV & Media Streaming Subscriptions	\$	- W - F - M - Y	
Other	\$	- W - F - M - Y	
Total	\$ p.m		
Personal Care	Amount	Frequency	Ownership
Clothing & Footwear	\$	W F M Y	
Cosmetics	\$. W . F . M . Y	
Dry Cleaning	\$. W . F . M . Y	
Personal Care	\$. W . F . M . Y	
Other	\$. W . F . M . Y	
Total	\$ p.m		

The other house you live in	Amount	Frequency	Ownership
Electricity & Gas	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Council Rates	\$. W . F . M . Y	
Water & Sewer	\$. W . F . M . Y	
Body Corporate	\$. W . F . M . Y	
Repairs & Maintenance	\$. W . F . M . Y	
Running Costs	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Building Insurance	\$. W . F . M . Y	
Contents Insurance	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Other	\$. W . F . M . Y	
Total	\$ p.m		
Recreational &			

Pets \$	Entertainment	Amount	Frequency	Ownership
Cinema/Concerts/ Memberships \$	Pets	\$. W . F . M . Y	
Memberships \$ Image: Windows of the second sec	Alcohol / Tobacco	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Gym / Sports \$		\$. W . F . M . Y	
Travel & Holidays \$	Dining Out	\$. W . F . M . Y	
Gifts & Miscellaneous	Gym / Sports	\$. W . F . M . Y	
	Travel & Holidays	\$. W . F . M . Y	
Gambling \$	Gifts & Miscellaneous	\$. W . F . M . Y	
	Gambling	\$	🗌 W 🗌 F 🗌 M 🗌 Y	
Other \$	Other	\$. W . F . M . Y	
Total \$ p.m	Total	\$ p.m		

Transport	Amount	Frequency	Ownership
Petrol	\$		
Registration	\$	₩ F M Y	
Vehicle Maintenance	\$	□ W □ F □ M □ Y	
Public Transport	\$	W F M Y	
Taxi/Ride Sharing	\$	□ W □ F □ M □ Y	
Tolls/Parking etc	\$	□ W □ F □ M □ Y	
Total	\$ p.m]	
Loans and Liabilities	Amount	Frequency	Ownership
	\$	- W - F - M - Y	
	\$	□ W □ F □ M □ Y	
	\$	- W - F - M - Y	
	\$	□ W □ F □ M □ Y	
	\$	- W - F - M - Y	
Total	\$ p.m		
Other	Amount	Frequency	Ownership
Regular Donations	\$	- W - F - M - Y	
Other	\$		
Total	\$ p.m		

History Address history

Applicant 1:	Applicant 2:	
Current address	Current address	
When did you move in?	When did you move in?	
MM YY	ММ УҮ	
Ownership	Ownership	
Own home Boarding	Own home Boarding	
Own home - mortgage	Own home - mortgage Caravan	
Renting To be purchased	Renting To be purchased	
With parents Other	With parents Other	
Previous address	Previous address	
When did you move in?	When did you move in?	
MM YY	MM YY	
Ownership	Ownership	
Own home Boarding	Own home Boarding	
Own home - mortgage	Own home - mortgage Caravan	
Renting To be purchased	Renting To be purchased	
With parents Other	With parents Other	
Previous address	Previous address	
When did you move in?	When did you move in?	
ММ УҮ	ММ	
Ownership	Ownership	
Own home Boarding	Own home Boarding	
Own home - mortgage	Own home - mortgage Caravan	
Renting To be purchased	Renting To be purchased	
With parents Other	With parents Other	
Previous address	Previous address	
When did you move in?	When did you move in?	
ММ УҮ	ММ УҮ	
Ownership	Ownership	
Own home Boarding	Own home Boarding	
Own home - mortgage Caravan	Own home - mortgage Caravan	
Renting To be purchased	Renting To be purchased	
With parents Other	With parents Other	

History Employment history

Applicant 1:		Applicant 2:	
Current primary job		Current primary job	
Nature of employment	Job basis	Nature of employment	Job basis
PAYG	Full time	PAYG	Full time
Self employed	Part time	Self employed	Part time
Unemployed	Contract	Unemployed	Contract
Retired	Temporary	Retired	Temporary
Home duties	Casual	Home duties	Casual
Job title		Job title	
Employer name		Employer name	
Employer contact first name		Employer contact first name	2
Employer contact last name		Employer contact last name	2
Employer address		Employer address	
Employer phone number		Employer phone number]
Employer type	Are you on probation?	Employer type	Are you on probation?
Private Public Date started	Yes No	PrivatePublicDate started	Yes No
ММ	YY	ММ	ҮҮ
Current secondary job		Current secondary job	
Nature of employment	Job basis	Nature of employment	Job basis
PAYG	Full time	PAYG	Full time
Self employed	Part time	Self employed	Part time
Unemployed	Contract	Unemployed	Contract
Retired	Temporary	Retired	Temporary
Home duties	Casual	Home duties	Casual
Job title		Job title	
Employer name		Employer name	
Employer contact first name		Employer contact first name	2
Employer contact last name		Employer contact last name	2

History Employment history

Applicant 1:		Applicant 2:	
Current secondary job cont'd		Current secondary job cont'd	
Employer address		Employer address	
Employer phone number		Employer phone number	
Employer type	Are you on probation?	Employer type	Are you on probation?
🗌 Private 🗌 Public	Yes No	🗌 Private 🗌 Public	Yes No
Date started		Date started	
ММ	ΥΥ	ММ	YY
Previous job 1		Previous job 1	
Nature of employment	Job basis	Nature of employment	Job basis
PAYG	Full time	PAYG	Full time
Self employed	Part time	Self employed	Part time
Unemployed	Contract	Unemployed	Contract
Retired	Temporary	Retired	Temporary
Home duties	Casual	Home duties	Casual
Job title		Job title	
Employer name		Employer name	
Employer contact first name	e	Employer contact first nam	ie
Employer contact last name		Employer contact last nam	
	e	Employer contact last name	e
Employer address		Employer address	
Employer phone number		Employer phone number	
Employer type	Were you on probation when you left?	Employer type	Were you on probation when you left?
🗌 Private 🗌 Public	Yes No	🗌 Private 🔲 Public	Yes No
Date ended		Date ended	
ММ	YY	ММ	YY

History Employment history

Previous job 2		Previous job 2	
Nature of employment	Job basis	Nature of employment	Job basis
PAYG	Full time	PAYG	Full time
Self employed	Part time	Self employed	Part time
Unemployed	Contract	Unemployed	Contract
Retired	Temporary	Retired	Temporary
Home duties	Casual	Home duties	Casual
Job title		Job title	
Employer name		Employer name	
Employer contact first name		Employer contact first name	
Employer contact last name		Employer contact last name	
Employer address		Employer address	
Employer phone number		Employer phone number	
Employer type W	ere you on probation when you left?	Employer type V	Vere you on probation when you left?
Private Public	Yes 🗌 No	Private Public	Yes No
Date ended		Date ended	
ММ	YY	ММ	ΥΥ

History Credit history

Have you or any co-applicants had any previous credit issues or bankruptcy?	Yes	No No
e.g. Trouble paying back a loan, credit car, moni	es owing to fi	riends/family etc.
If yes, please provide more details:		
Are you or any co-applicants behind in repaying any current debts or loans? If yes, please provide more details:	Pres	□ No
Have you or any co-applicants been a director in the past 5 years?	Yes	No No

If yes, please provide more details: