



Personal Details

Name(s)

1. _____ D.O.B _____

2. _____ D.O.B _____

Address: _____ Years There _____
_____ State _____ Postcode _____

Drivers License No: 1. _____ 2. _____

Previous Address (if less than 2 years)

Address: _____ Years There _____
_____ State _____ Postcode _____

Home Ph: _____ Business Ph: _____ Fax: _____

Mobile Ph: _____ Email: _____

Number of Dependants: _____ Ages: _____

Employment Details

Applicant 1:

Employer: _____

Job Title: _____ Period of employment _____ to _____

If Self Employed, Accountant's details: _____

Previous Employer (if less than 2 years)

Employer: _____

Job Title: _____ Period of employment _____ to _____

Applicant 2:

Employer: _____

Job Title: _____ Period of employment _____ to _____

If Self Employed, Accountant's details: _____

Previous Employer (if less than 2 years)

Employer: _____

Job Title: _____ Period of employment _____ to _____

Loan Details

Loan amount: \$ _____

Loan Purpose / Discussion: _____

Security Offered: _____

Pre-approval Full Approval Other (specify) _____

Proposed settlement date: ____/____/____

Deal Specific / Comments: _____

Financial Statement

Liabilities

Loan Type: **Amount Outstanding:**

Mortgage 1: _____

Mortgage 2: _____

Mortgage 3: _____

Mortgage 4: _____

Car Finance: _____

Credit Cards: _____

Limit \$: _____

Other Loans: _____

Other (specify): _____

Total Liabilities: _____

Assets

Asset Type: **Value:**

Property at: _____

Motor Vehicles: _____

Deposit Paid on Property: _____

Cash at Bank: _____

Superannuation: _____

Shares & Investments: _____

Personal Effects: _____

Other (specify): _____

Total Assets: _____

Surplus Assets: _____

Credit Experience - Comments: _____

Preferred Lender (if any): _____

Income & Expenditure

Income:	Monthly:	Expenditure:	Monthly:
Base Salary:	_____	Mortgage 1 repayments:	_____
Regular Overtime:	_____	Mortgage 2 repayments:	_____
Commissions/ Allowances:	_____	Car 1 Finance/ repayments:	_____
Additional/part time/ Casual employment:	_____	Other Loan repayments:	_____
Interest/dividends:	_____	Credit Card 1 repayments:	_____
Government Pension/ Benefits:	_____	Limit \$:	_____
Rent received (Gross):	_____	Credit Card 2 repayments:	_____
Other (specify):	_____	Limit \$:	_____
	_____	Other (specify):	_____
Total Income:	_____	Total expenditure:	_____
Surplus Income:	_____		

Privacy disclosure statement and consent

We are collecting personal information about you to provide you with our brokering services. The information is required to allow us to assist you in preparing the loan application and locate an appropriate lender. If your information is not provided we may not be able to find a loan for you.

Unless you tell us not to, we may use your information to provide you with offers or information of other goods or services we or a third party can provide you with.

We may disclose your information to other organisations to help us provide our services and arrange the loan. The types of organisations we may disclose your information to include lenders, mortgage insurers, other mortgage intermediaries, valuers; and other organisations which assist us (such as printers, mailing houses, lawyers, and accountants).

In addition, we may disclose your personal information to any other organisation that may wish to, or has acquired, an interest in your loan, or in our business.

You can gain access to the information we hold about you by contacting us.

You agree that we may collect and use your personal information as specified above.

Signature:	_____	Signature:	_____
Full name:	_____	Full name:	_____
Date:	_____	Date:	_____

Reason for Loan Decision:

Broker's Signature: _____

Broker's Full Name: _____

Date: _____

Acknowledgement :

1. You acknowledge that we do not provide legal or financial advice, however , it is important you ensure you understand your legal obligations under the loan , and the financial consequences. If you have any doubts, you should obtain independent legal and financial advice before you enter into the loan contract.

If legal and financial advice re this loan has been sought, please provide names and phone numbers:

Accountant _____	Financial Planner _____
_____	_____
_____	_____

2. You acknowledge that the above loan suggestion was explained to you in full and you are happy to proceed on that basis.

Signature: _____	Signature: _____
Full name: _____	Full name: _____
Date: _____	Date: _____