

To assist your discussions, please complete this form and return it to your broker before your appointment. If you are unsure of how to complete any section in this editable document your broker will be able to help you.

Date Completed

Broker Name	Broker Contact Number
Loan Amount Sought \$	Purchase Price or Property Value \$

Customer Information

Personal	Applicant 1	Applicant 2
Title <i>(please select)</i>	Mr Mrs Miss Ms Dr Other	Mr Mrs Miss Ms Dr Other
First and middle names:		
Surname:		
Date of birth:		
Contact phone numbers:	Home: Work: Mobile:	Home: Work: Mobile:
Email address:		
Current Residential Address		
Current address:		
	Suburb State Postcode	Suburb State Postcode
How long have you been at this current address:	Date moved in	Date moved in
Current status:	Owner Renting Boarding Living with parents Owner with mortgage	Owner Renting Boarding Living with parents Owner with mortgage
Previous address: <i>(if at current address for less than 3 years)</i>		
	Suburb State Postcode	Suburb State Postcode
How long were you at this address:	Date moved in Date moved out:	Date moved in Date moved out:
Residency status:	Australian citizen Temporary resident Permanent resident Visitor	Australian citizen Temporary resident Permanent resident Visitor
Marital status:	Married De Facto Single Separated Divorced Widowed	Married De Facto Single Separated Divorced Widowed
Mother's maiden name:		
Drivers licence / State issued ID:	No: State/Government issuer: Expiry date:	No: State/Government issuer: Expiry date:
Number of dependent children:		
Age / Date of birth of dependent children:		
Nearest Living Relative:	Name: Relationship: Contact number:	Name: Relationship: Contact number:
Relative address:		
	Suburb State Postcode	Suburb State Postcode

Applicant 1

Applicant 2

Employment										
Current employment type:	Full-time Permanent	Part-time	Contract Self-Employed	Casual	Full-time Permanent	Part-time	Contract Self-Employed	Casual		
Current employer's name: <i>(in full)</i>										
Contact details: <i>(for verifying employment)</i>	Name:				Name:					
	Phone Number:				Phone Number:					
Current employer address:										
	Suburb		State	Postcode	Suburb		State	Postcode		
Current Occupation / Job title:										
Time with current employer:	Start date:				Start date:					
Income – gross annual salary: <i>(before tax)</i>	\$:				\$:					
Gross annual overtime/ penalties: <i>(before tax)</i>	\$:				\$:					
Other annual income – pensions, FTB: <i>(P.A. before tax)</i>	\$:				\$:					
Income – gross weekly rental income: <i>(before tax)</i>	\$:				\$:					
Previous employer's full name: <i>(if current employment is less than 3 years)</i>										
Time with previous employer:	Start date:		End date:		Start date:		End date:			
Previous employer's phone number:										
Previous employment type:	Full-time Permanent	Part-time	Contract Self-Employed	Casual	Full-time Permanent	Part-time	Contract Self-Employed	Casual		
Previous Occupation/Job title:										
ABN: <i>(if self employed)</i>										
Director of a company:	No:	Yes: (if yes, complete the below section)			No:	Yes: (if yes, complete the below section)				
	Company / Trust 1				Company / Trust 2					
Company / Trust Name:										
Director(s) name:										
Trading address:										
	Suburb		State	Postcode	Suburb		State	Postcode		
Number of years registered:										
ACN:										

ASSETS

Properties Owned	Property 1			Property 2			Property 3			
Address:										
	Suburb		State	Postcode	Suburb		State	Postcode	Suburb	
Owner occupied:	No	Yes			No	Yes			No	Yes
Value:	\$:			\$:			\$:			
In the name of:	Applicant 1	Applicant 2			Applicant 1	Applicant 2			Applicant 1	Applicant 2

Assets (Continued)						
Savings Account and Term Deposits	Account 1		Account 2		Account 3	
Financial institution:						
In the name of:	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2
Balance:	\$:		\$:		\$:	
Motor Vehicles	Vehicle 1		Vehicle 2		Vehicle 3	
Make and model:						
Year built:						
In the name of:	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2
Value:	\$:		\$:		\$:	
Superannuation	Applicant 1		Applicant 2			
Value:	\$:		\$:			
Household Items						
Value <i>Hint: what value is your home and contents insured for?:</i>			\$:			
Other Assets						
Asset Type:						
Value: <i>(caravan, boat, shares etc)</i>	\$:		\$:		\$:	
Liabilities	Mortgage 1		Mortgage 2		Mortgage 3	
In the name of:	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2
Name of financial institution:						
Original loan amount:	\$:		\$:		\$:	
Outstanding balance:	\$:		\$:		\$:	
Minimum monthly repayment:	\$:		\$:		\$:	
Account number:						
Other Liabilities	Loan 1		Loan 2		Loan 3	
Loan type: <i>(Car / Personal / HECS / Other Loans)</i>						
In the name of:	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2
Name of financial institution:						
Original loan amount:	\$:		\$:		\$:	
Amount currently owing:	\$:		\$:		\$:	
Monthly repayment:	\$:		\$:		\$:	
Account number:						
Is loan being paid out?	Yes	No	Yes	No	Yes	No
	How		How		How	
Credit Cards / Store Cards	Card 1		Card 2		Card 3	
In the name of:	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2
Name of financial institution:						
Credit limit:	\$:		\$:		\$:	
Amount currently owing:	\$:		\$:		\$:	

The following table is designed to assist in determining your average monthly living expenses, and it is important to complete it accurately.

Customer Declared Living Expenses		
Monthly Living Expenses – Basic	\$ Per Month	Notes
Utilities: <i>(Electricity, Water, Gas, Rates, Phone, Internet etc)</i>	\$:	
Education: <i>(Public School Fees, Uniforms, Textbooks etc)</i>	\$:	
Child Care Costs:	\$:	
Groceries: <i>(Food, Household Supplies / Consumables, Cosmetics etc)</i>	\$:	
Healthcare: <i>(Chemists and Medical Expenses etc)</i>	\$:	
Transport: <i>(Car Rego, Fuel, regular Public Transport costs)</i>	\$:	
Insurance: <i>(Building and Contents Insurance)</i>	\$:	
Entertainment: <i>(Pay TV, Eating Out, Cinema etc)</i>	\$:	
Other: <i>(House Maintenance, Board & Lodging)</i>	\$:	
TOTAL – Basic	\$	
Monthly Living Expenses – Fixed or Recurring	\$ Per Month	Notes
Private Health Insurance:	\$:	
Life Insurance:	\$:	
Comprehensive Car Insurance:	\$:	
Other Insurance: <i>(Income Protection, Specified Items, Landlord)</i>	\$:	
Private School Fees, Ongoing Private Tuition etc:	\$:	
Court-Ordered Child Maintenance:	\$:	Balance
Ongoing Rental Payments:	\$:	
Other:	\$:	
TOTAL – Fixed or Recurring	\$	
TOTAL – Basic + Fixed or Recurring	\$	
Additional Commentary:		