

PERSONAL DETAILS OF APPLICANT

Client Marital Status Single Married Defacto Divorced/Separated
 Mr Mrs Ms Miss

First Name Middle Names Surname

DOB Driver's Lic# Driver's Lic/State Expiry Date Email

Current Home Address Suburb

State Post Code At Address for Yrs Mths Your Accomodation Status Own Mortgage Rent Board Other

Previous Address: Suburb:

State Postcode At Address for Yrs Mths Your Accomodation Status Own Mortgage Rent Board Other

Mobile Phone Home Phone Work Phone Fax

Current Employer Contact Person Contact Phone

Current Employers Address Occupation

Employment Type Full Time Part Time Casual Self Empl Other With Employer for Yrs Mths Time In This industry Yrs Mths

Previous Employer (last 5 years required) Previous Occupation With Employer for Yrs Mths

2 PERSONAL REFERENCES (REQUIRED)

Name of nearest Relative not living with you Email (Required)

Address Mobile Phone Home Phone

Name of Friend or Relative not living with you Email (Required)

Address Mobile Phone Home Phone

PRELIMINARY ASSESSMENT & CAPACITY ANALYSIS



Number of Dependants Age of Dependants

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Income (Average After Tax)

W F M

Partner's Monthly Income \$

Applicant Declared Monthly Expenditure

Motor Vehicle \$

Applicant \$

All Insurances \$

Rental Income \$

Telecoms \$

Child Maintenance CSA \$

Rates/Utilities \$

Family Allowance \$

Living Expenses \$

Pensions \$

Education/Super Contributions \$

Other \$

Other \$

Assets

Description

Residence \$

Investment Property \$

Investment Property \$

Vehicle \$

Cash at Bank \$

Home Contents \$

Super Annuation \$

Explanation

Other \$

Liabilities

\$ Balance

Mortgage \$

Mortgage \$

Mortgage \$

Car Loan \$

Personal Loan \$

Rent/Board \$

CC Limit 1 \$

CC Limit \$

Other \$

Monthly Finance Expenses

Creditor

Pmt Amount

\$

\$

\$

\$

\$

\$

\$

\$

Agent's Name

Phone No

\$

\$

\$

\$

I declare that the above information provided is true and correct.

Yes No

Do you expect any significant change to your financial position over the term of the proposed loan which may impact your ability to make the proposed repayments under the loan contract.

Yes No If YES, please explain:

Signed

Date