



## Applicant 1

### Client Personal Information

Title Mr / Mrs / Ms / Miss / Dr / Other \_\_\_\_\_  
First Name \_\_\_\_\_  
Middle Name \_\_\_\_\_  
Surname \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Status Single / De facto / Married / Other \_\_\_\_\_  
Dependants \_\_\_\_\_ Ages \_\_\_\_\_  
Mothers Maiden Name \_\_\_\_\_

Residency Citizen / Resident / Non Resident

Address \_\_\_\_\_  
\_\_\_\_\_

Time at Add. \_\_\_\_\_ Rent/Board/Own/ \_\_\_\_\_

Postal Add. \_\_\_\_\_  
\_\_\_\_\_

Previous A. \_\_\_\_\_  
\_\_\_\_\_

Time at Add. \_\_\_\_\_ Rent/Board/Own/ \_\_\_\_\_

Home Ph ( \_\_\_\_\_ ) \_\_\_\_\_

Work Ph ( \_\_\_\_\_ ) \_\_\_\_\_

Mobile Ph \_\_\_\_\_

Fax W / H ( \_\_\_\_\_ ) \_\_\_\_\_

Email \_\_\_\_\_

## Applicant 2

### Client Personal Information

Title Mr / Mrs / Ms / Miss / Dr / Other \_\_\_\_\_  
First Name \_\_\_\_\_  
Middle Name \_\_\_\_\_  
Surname \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Status Single / De facto / Married / Other \_\_\_\_\_  
Dependants \_\_\_\_\_ Ages \_\_\_\_\_  
Mothers Maiden Name \_\_\_\_\_

Residency Citizen / Resident / Non Resident

Address \_\_\_\_\_  
\_\_\_\_\_

Time at Add. \_\_\_\_\_ Rent/Board/Own/ \_\_\_\_\_

Postal Add. \_\_\_\_\_  
\_\_\_\_\_

Previous A. \_\_\_\_\_  
\_\_\_\_\_

Time at Add. \_\_\_\_\_ Rent/Board/Own/ \_\_\_\_\_

Home Ph ( \_\_\_\_\_ ) \_\_\_\_\_

Work Ph ( \_\_\_\_\_ ) \_\_\_\_\_

Mobile Ph \_\_\_\_\_

Fax W / H ( \_\_\_\_\_ ) \_\_\_\_\_

Email \_\_\_\_\_

## Applicant 1

## Applicant 2

### Current Employer

Status \_\_\_\_\_  
Full Time / Part Time / Casual / Self Employed \_\_\_\_\_  
Start Date \_\_\_\_\_ On Probation  Yes  No  
Role \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact \_\_\_\_\_  
Phone ( \_\_\_\_\_ ) \_\_\_\_\_

### Current Employer

Status \_\_\_\_\_  
Full Time / Part Time / Casual / Self Employed \_\_\_\_\_  
Start Date \_\_\_\_\_ On Probation  Yes  No  
Role \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact \_\_\_\_\_  
Phone ( \_\_\_\_\_ ) \_\_\_\_\_

### Previous Employer

(If less than 3 years at current )

Status \_\_\_\_\_  
Full Time / Part Time / Casual / Self Employed \_\_\_\_\_  
Start Date \_\_\_\_\_ End Date \_\_\_\_\_  
Role \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact \_\_\_\_\_  
Phone ( \_\_\_\_\_ ) \_\_\_\_\_

### Previous Employer

(If less than 2 years at current )

Status \_\_\_\_\_  
Full Time / Part Time / Casual / Self Employed \_\_\_\_\_  
Start Date \_\_\_\_\_ End Date \_\_\_\_\_  
Role \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact \_\_\_\_\_  
Phone ( \_\_\_\_\_ ) \_\_\_\_\_

Number of employers in the last 4 years \_\_\_\_\_

Number of employers in the last 4 years \_\_\_\_\_

## Income Details ( Annually )

	Applicant 1	Applicant 2
Salary Gross	_____	_____
Regular Overtime	_____	_____
Family Allowance	_____	_____
Social Security / Pension	_____	_____
Rental Income ( Existing )	_____	_____
Rental Income ( Proposed )	_____	_____
Commission Income	_____	_____
Investment Income	_____	_____
Other	_____	_____

## Asset Statement ( what you own )

### Real Estate

	<i>Address</i>	<i>To Be Used As Security</i>	<i>Value</i>
Property 1	_____	Yes / No	_____
Property 2	_____	Yes / No	_____
Property 3	_____	Yes / No	_____

### Motor Vehicles

<i>Make &amp; Model</i>	<i>Year</i>	<i>Value</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Savings / Investment Accounts

<i>Name of Institution</i>	<i>BSB</i>	<i>Account Number</i>	<i>Value</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

### Shares / Investments

<i>Type of Investment</i>	<i>Value</i>
_____	_____
_____	_____
_____	_____

### Miscellaneous

Home Contents Insured Value .....	_____
Superannuation Value - App 1 _____ App 2 _____ .....	_____
Deposit Paid On Property Purchasing .....	_____
Boats / Caravans / Other - Details _____ .....	_____
Tools of the Trade .....	_____

## Liability Statement ( what you owe )

### Real Estate

	<i>Lender</i>	<i>Limit</i>	<i>Total Owing</i>	<i>Monthly</i>	<i>To Cease</i>
Property 1	_____	_____	_____	_____	Yes / No
Property 2	_____	_____	_____	_____	Yes / No
Property 3	_____	_____	_____	_____	Yes / No

### Credit Cards

	<i>Issuer</i>	<i>Limit</i>	<i>Total Owing</i>	<i>Monthly</i>	<i>To Cease</i>
MC / Visa	_____	_____	_____	_____	Yes / No
MC / Visa	_____	_____	_____	_____	Yes / No
MC / Visa	_____	_____	_____	_____	Yes / No
MC / Visa	_____	_____	_____	_____	Yes / No

### Personal Loans

	<i>Lender</i>	<i>Reason</i>	<i>Total Owing</i>	<i>Monthly</i>	<i>To Cease</i>
_____	_____	_____	_____	_____	Yes / No
_____	_____	_____	_____	_____	Yes / No
_____	_____	_____	_____	_____	Yes / No

### Miscellaneous

	<i>Total Owing</i>	<i>Monthly</i>	<i>To Cease</i>
Debts Guaranteed By You .....	_____	_____	
Rent / Board .....		_____	Yes / No
Superannuation (not including employers contributions) .....		_____	Yes / No
Child Maintenance .....		_____	Yes / No
Other (Heccs / Tax etc) - Details _____	_____	_____	Yes / No

# Required Documentation

## Identification Documents

Description	Points
<input type="checkbox"/> Birth Certificate/Passport	70
<input type="checkbox"/> Australian Drivers Licence	40
<input type="checkbox"/> Medicare Card	25
<input type="checkbox"/> Rates Notice	25
<input type="checkbox"/> Mastercard / Visa*	25

(\*For more than 1, must be different banks)

## Proof Of Residence Documents

- Rates Notice; or
- Tenancy Agreement
- Letter from owner of the house/landlord

## PAYG Income

- 2 Pay slips showing year to date figures;
- or
- Letter from employer\*; and
  - Group Certificate for the 07/08 financial yr\*\*

(\*detailing wages, status and period at employer)

(\*\*if at employer for less than 1 year)

## Self Employed Income

(All below required)

- Last 2 yrs Tax Returns  
(Individual & business)
- Last 2 yrs Business Financials

## Bank Statements

(Internet Statements are not acceptable)

- 6 Months on all debts being refinanced
- 3 Months for all bank accounts
- 1 Months for all credit cards

## Identification Documents for FHOGS\*

- Drivers Licence; and
- Marriage Certificate (if applicable); and
- Birth Certificate; or
- Passport;

(\* For FHOGS, must be JP certified copies)

## Property Purchasing

(All of the following are required when available)

- Signed Purchase Contract
- Evidence / Receipt of Deposit Paid

## Rental Income

(One of the following is required per rental property)

- Current Lease Agreement
- Letter from Real Estate Agent
- Real Estate Agents Statement

## Benefits / Other Income

(Documents no older than 2 mths/annual statements)

- Centrelink Statement
- Superannuation Annual Statement

## Nearest Friend/Relative Details

Most banks require the details of your nearest relative or friend (not living with you), for someone to contact as a final resort if they cannot contact you.

**Please provide a name, home telephone number, home address and relationship**