



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

- ☐ Single ☐ Married ☐ De facto
☐ Separated ☐ Divorced ☐ Widowed

Gender

- ☐ 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

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-resident

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

- ☐ Single ☐ Married ☐ Defacto
☐ Separated ☐ Divorced ☐ Widowed

Gender

- ☐ 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-resident

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?

Applicant 1: _____

☐ Own

What type of property?

☐ Industrial ☐ Residential ☐ Rural ☐ Commercial

Address

When did you move in?

MM

YY

Estimated property value

\$

Are you paying off a mortgage? ☐ Yes ☐ No

If you answered yes:

Which lender are you with?

Remaining mortgage amount

\$

Repayment schedule

Repayment amount

\$

Is interest tax deductible?

☐ Yes ☐ No

☐ Rent

Address

When did you move in?

MM

YY

☐ Boarding

Address

When did you move in?

MM

YY

☐ Living with parents

Address

When did you move in?

MM

YY

Applicant 2: _____

☐ Same as applicant 1

☐ Own

What type of property?

☐ Industrial ☐ Residential ☐ Rural ☐ Commercial

Address

When did you move in?

MM

YY

Estimated property value

\$

Are you paying off a mortgage? ☐ Yes ☐ No

If you answered yes:

Which lender are you with?

Remaining mortgage amount

\$

Repayment schedule

Repayment amount

\$

Is interest tax deductible?

☐ Yes ☐ No

☐ Rent

Address

When did you move in?

MM

YY

☐ Boarding

Address

When did you move in?

MM

YY

☐ Living with parents

Address

When did you move in?

MM

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

Do you own a residential property? ☐ Yes ☐ No

Detailed type

☐ Apt unit flat ☐ Fully detached house ☐ Semi-detached house

☐ Terrace ☐ Property development ☐ Vacant land

☐ Other: _____

Address

Estimated value of property

If paying a mortgage, please complete the following fields:

Lender

Remaining mortgage amount

Monthly repayment amount

Is interest tax deductible?

☐ Yes ☐ No

Are you going to refinance this mortgage?

☐ Yes ☐ No

If no, will you be using this property as security?

☐ Yes ☐ No

Does this property generate rental income?

☐ Yes ☐ No

If yes, what is the monthly rental income?

Do you own a second residential property? ☐ Yes ☐ No

Detailed type

☐ Apt unit flat ☐ Fully detached house ☐ Semi-detached house

☐ Terrace ☐ Property development ☐ Vacant land

☐ Other: _____

Address

Estimated value of property

If paying a mortgage, please complete the following fields:

Lender

Remaining mortgage amount

Monthly repayment amount

Is interest tax deductible?

☐ Yes ☐ No

Are you going to refinance this mortgage?

☐ Yes ☐ No

If no, will you be using this property as security?

☐ Yes ☐ No

Does this property generate rental income?

☐ Yes ☐ No

If yes, what is the monthly rental income?

Properties

Other properties

Do you own an industrial property? ☐ Yes ☐ No

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

Monthly repayment amount

Is interest tax deductible?

☐ Yes ☐ No

Are you going to refinance this mortgage?

☐ Yes ☐ No

If no, will you be using this property as security?

☐ Yes ☐ No

Does this property generate rental income?

☐ Yes ☐ No

If yes, what is the monthly rental income?

Do you own a rural property? ☐ Yes ☐ No

Detailed type

☐ 8 hectares or less ☐ Over 8 hectares but less than 40 ☐ Over 40 hectares

Address

Estimated value of property

If paying a mortgage, please complete the following fields:

Lender

Remaining mortgage amount

Monthly repayment amount

Is interest tax deductible?

☐ Yes ☐ No

Are you going to refinance this mortgage?

☐ Yes ☐ No

If no, will you be using this property as security?

☐ Yes ☐ No

Does this property generate rental income?

☐ Yes ☐ No

If yes, what is the monthly rental income?

Properties

Other properties

Do you own a commercial property? ☐ Yes ☐ No

Detailed type

- ☐ Prof chambers ☐ Offices ☐ Factory
☐ Warehouse ☐ Vacant Land ☐ Retirement Village
☐ Residential commercial ☐ Non-specialised commercial
☐ Other: _____

Address

Estimated value of property

If paying a mortgage, please complete the following fields:

Lender

Remaining mortgage amount

Monthly repayment amount

Is interest tax deductible?

- ☐ Yes ☐ No

Are you going to refinance this mortgage?

- ☐ Yes ☐ No

If no, will you be using this property as security?

- ☐ Yes ☐ No

Does this property generate rental income?

- ☐ Yes ☐ No

If yes, what is the monthly rental income?

Notes

Financial position

Assets

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

Applicant 1: _____

Motor Vehicle 1

Make

Year

Value

\$

Description (optional)

Motor Vehicle 2

Make

Year

Value

\$

Description (optional)

Boat

Value

\$

Description (optional)

Savings

Value

\$

Description (optional)

Bonds

Value

\$

Description (optional)

Managed funds

Value

\$

Description (optional)

Applicant 2: _____

Motor Vehicle 1

Make

Year

Value

\$

Description (optional)

Motor Vehicle 2

Make

Year

Value

\$

Description (optional)

Boat

Value

\$

Description (optional)

Savings

Value

\$

Description (optional)

Bonds

Value

\$

Description (optional)

Managed funds

Value

\$

Description (optional)

Financial position

Assets

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

Applicant 1: _____

Shares

Value

\$

Description (optional)

Cash

Value

\$

Description (optional)

Debenture charge

Value

\$

Description (optional)

Cheque account

Value

\$

Description (optional)

Cash management

Value

\$

Description (optional)

Pension account

Value

\$

Description (optional)

Term account

Value

\$

Description (optional)

Applicant 2: _____

Shares

Value

\$

Description (optional)

Cash

Value

\$

Description (optional)

Debenture charge

Value

\$

Description (optional)

Cheque account

Value

\$

Description (optional)

Cash management

Value

\$

Description (optional)

Pension account

Value

\$

Description (optional)

Term account

Value

\$

Description (optional)

Financial position

Assets

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

Applicant 1: _____

Savings account

Value

\$

Description (optional)

Deposit paid

Value

\$

Description (optional)

Furniture

Value

\$

Description (optional)

Superannuation

Value

\$

Description (optional)

Goodwill

Value

\$

Description (optional)

Home contents

Value

\$

Description (optional)

Receivables

Value

\$

Description (optional)

Applicant 2: _____

Savings account

Value

\$

Description (optional)

Deposit paid

Value

\$

Description (optional)

Furniture

Value

\$

Description (optional)

Superannuation

Value

\$

Description (optional)

Goodwill

Value

\$

Description (optional)

Home contents

Value

\$

Description (optional)

Receivables

Value

\$

Description (optional)

Financial position

Assets

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

Applicant 1: _____

Equity

Value

\$

Description (optional)

Applicant 2: _____

Equity

Value

\$

Description (optional)

Tools of trade

Value

\$

Description (optional)

Tools of trade

Value

\$

Description (optional)

Stock machinery

Value

\$

Description (optional)

Stock machinery

Value

\$

Description (optional)

Collections

Value

\$

Description (optional)

Collections

Value

\$

Description (optional)

Charge over cash

Value

\$

Description (optional)

Charge over cash

Value

\$

Description (optional)

Guarantee

Value

\$

Description (optional)

Guarantee

Value

\$

Description (optional)

Gifts

Value

\$

Description (optional)

Gifts

Value

\$

Description (optional)

Financial position

Assets

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

Applicant 1: _____

Time share

Value

\$

Description *(optional)*

Life insurance

Value

\$

Description *(optional)*

Other

Value

\$

Description *(optional)*

Applicant 2: _____

Time share

Value

\$

Description *(optional)*

Life insurance

Value

\$

Description *(optional)*

Other

Value

\$

Description *(optional)*

Financial position

Liabilities

Please complete the fields below if you have the following liabilities:

Applicant 1: _____

Credit Card

Creditor

\$

Current balance

\$

Total card limit

\$

Total monthly repayments

\$

Description *(optional)*

Charge card

Creditor

\$

Current balance

\$

Total card limit

\$

Total monthly repayments

\$

Description *(optional)*

Applicant 2: _____

Credit Card

Creditor

\$

Current balance

\$

Total card limit

\$

Total monthly repayments

\$

Description *(optional)*

Charge card

Creditor

\$

Current balance

\$

Total card limit

\$

Total monthly repayments

\$

Description *(optional)*

Financial position

Liabilities

Please complete the fields below if you have the following liabilities:

Applicant 1: _____

Store card

Creditor	Current balance
\$	\$
Total card limit	Total monthly repayments
\$	\$
Description (optional)	

Car loan

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Personal loan

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Sudent loan

Current balance	Total monthly repayments
\$	\$
Description (optional)	

ATO Centrelink Debt

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Outstanding tax

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Applicant 2: _____

Store card

Creditor	Current balance
\$	\$
Total card limit	Total monthly repayments
\$	\$
Description (optional)	

Car loan

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Personal loan

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Sudent loan

Current balance	Total monthly repayments
\$	\$
Description (optional)	

ATO Centrelink Debt

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Outstanding tax

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Financial position

Liabilities

Please complete the fields below if you have the following liabilities:

Applicant 1: _____

Contingent liability

Creditor	Current balance
\$	\$
Total card limit	Total monthly repayments
\$	\$
Description (optional)	

Court ruled child maintenance

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Court ruled other debt

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Line of credit

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Lease

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Loan as guarantor

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Applicant 2: _____

Contingent liability

Creditor	Current balance
\$	\$
Total card limit	Total monthly repayments
\$	\$
Description (optional)	

Court ruled child maintenance

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Court ruled other debt

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Line of credit

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Lease

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Loan as guarantor

Current balance	Total monthly repayments
\$	\$
Description (optional)	

Financial position

Liabilities

Please complete the fields below if you have the following liabilities:

Applicant 1: _____

Loan

Creditor

Current balance

\$

\$

Total card limit

Total monthly repayments

\$

\$

Description (optional)

Overdraft

Current balance

Total monthly repayments

\$

\$

Description (optional)

Term loan

Current balance

Total monthly repayments

\$

\$

Description (optional)

Other

Current balance

Total monthly repayments

\$

\$

Description (optional)

Applicant 2: _____

Loan

Creditor

Current balance

\$

\$

Total card limit

Total monthly repayments

\$

\$

Description (optional)

Overdraft

Current balance

Total monthly repayments

\$

\$

Description (optional)

Term loan

Current balance

Total monthly repayments

\$

\$

Description (optional)

Other

Current balance

Total monthly repayments

\$

\$

Description (optional)

Financial position

Income

Please complete the fields below if you have the following income:

Salary/Wage

Pre-tax monthly income

\$

Employer name

Employer address

Job status

☐ Current primary job

☐ Current secondary job

☐ Previous job

Job type

☐ PAYG

☐ Self-employed

☐ Retired

☐ Home duties

Job basis

☐ Full time

☐ Part time

☐ Contract

☐ Temporary

Salary/Wage

Pre-tax monthly income

\$

Employer name

Employer address

Job status

☐ Current primary job

☐ Current secondary job

☐ Previous job

Job type

☐ PAYG

☐ Self-employed

☐ Retired

☐ Home duties

Job basis

☐ Full time

☐ Part time

☐ Contract

☐ Temporary

Regular overtime

Pre-tax monthly income

\$

Details (optional)

Regular overtime

Pre-tax monthly income

\$

Details (optional)

Bonus/commission

Type

☐ Bonus

☐ Commission

Pre-Tax monthly income

\$

Employer name

Employer address

Job status

☐ Current primary job

☐ Current secondary job

☐ Previous job

Job type

☐ PAYG

☐ Self-employed

☐ Retired

☐ Home duties

Job basis

☐ Full time

☐ Part time

☐ Contract

☐ Temporary

Bonus/commission

Type

☐ Bonus

☐ Commission

Pre-Tax monthly income

\$

Employer name

Employer address

Job status

☐ Current primary job

☐ Current secondary job

☐ Previous job

Job type

☐ PAYG

☐ Self-employed

☐ Retired

☐ Home duties

Job basis

☐ Full time

☐ Part time

☐ Contract

☐ Temporary

Financial position

Income

Please complete the fields below if you have the following income:

Allowance

Type

- ☐ Car allowance
- ☐ Company car allowance
- ☐ Work allowance
- ☐ Disability allowance

Pre-tax monthly income

\$

Details (optional)

Allowance

Type

- ☐ Car allowance
- ☐ Company car allowance
- ☐ Work allowance
- ☐ Disability allowance

Pre-tax monthly income

\$

Details (optional)

Superannuation

Type

- ☐ Private
- ☐ Superannuation

Pre-tax monthly income

\$

Financial Institution (optional)

Superannuation

Type

- ☐ Private
- ☐ Superannuation

Pre-tax monthly income

\$

Financial Institution (optional)

Investment income

Type

- ☐ Annuities
- ☐ Dividends
- ☐ Interest

Pre-tax monthly income

\$

Description (optional)

Investment income

Type

- ☐ Annuities
- ☐ Dividends
- ☐ Interest

Pre-tax monthly income

\$

Description (optional)

Government payments

Type

- ☐ Family allowance
- ☐ Unemployed allowance
- ☐ Widow allowance
- ☐ Child support
- ☐ Other:

Pre-tax monthly income

\$

Details (optional)

Government payments

Type

- ☐ Family allowance
- ☐ Unemployed allowance
- ☐ Widow allowance
- ☐ Child support
- ☐ Other:

Pre-tax monthly income

\$

Details (optional)

Financial position

Income

Please complete the fields below if you have the following income:

Company profit

Pre-tax monthly income

\$

Details (optional)

Company profit

Pre-tax monthly income

\$

Details (optional)

Other

Type

☐ Worker's compensation

☐ Other:

Pre-tax monthly income

\$

Details (optional)

Other

Type

☐ Worker's compensation

☐ Other:

Pre-tax monthly income

\$

Details (optional)

Financial position

Expenses

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

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

Financial position

Expenses

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
Building Insurance	\$	☐ W ☐ F ☐ M ☐ Y	
Contents Insurance	\$	☐ W ☐ F ☐ M ☐ Y	
Health Insurance	\$	☐ W ☐ F ☐ M ☐ Y	
Income Protection	\$	☐ W ☐ F ☐ M ☐ Y	
Life Insurance	\$	☐ W ☐ F ☐ M ☐ Y	
Vehicle Insurance	\$	☐ W ☐ F ☐ M ☐ Y	
Other _____	\$	☐ W ☐ F ☐ M ☐ Y	
Total	\$ p.m		

Child Care & Support	Amount	Frequency	Ownership
Child care	\$	☐ W ☐ F ☐ M ☐ Y	
Child maintenance	\$	☐ W ☐ F ☐ M ☐ Y	
Total	\$ p.m		

Financial position

Expenses

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	\$	☐ W ☐ F ☐ M ☐ Y	
Building Insurance	\$	☐ W ☐ F ☐ M ☐ Y	
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		

Financial position

Expenses

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 & Entertainment

	Amount	Frequency	Ownership
Pets	\$	☐ W ☐ F ☐ M ☐ Y	
Alcohol / Tobacco	\$	☐ W ☐ F ☐ M ☐ Y	
Cinema/Concerts/ Memberships	\$	☐ W ☐ F ☐ M ☐ Y	
Dining Out	\$	☐ W ☐ F ☐ M ☐ Y	
Gym / Sports	\$	☐ W ☐ F ☐ M ☐ Y	
Travel & Holidays	\$	☐ W ☐ F ☐ M ☐ Y	
Gifts & Miscellaneous	\$	☐ W ☐ F ☐ M ☐ Y	
Gambling	\$	☐ W ☐ F ☐ M ☐ Y	
Other _____	\$	☐ W ☐ F ☐ M ☐ Y	
Total	\$ p.m		

Financial position

Expenses

Transport	Amount	Frequency	Ownership
Petrol	\$	☐ W ☐ F ☐ M ☐ Y	
Registration	\$	☐ W ☐ 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	\$	☐ W ☐ F ☐ M ☐ Y	
Total	\$p.m		

History

Address history

Applicant 1: _____

Current address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Previous address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Previous address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Previous address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Applicant 2: _____

Current address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Previous address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Previous address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

Previous address

When did you move in?

MM

YY

Ownership

- ☐ Own home
- ☐ Boarding
- ☐ Own home - mortgage
- ☐ Caravan
- ☐ Renting
- ☐ To be purchased
- ☐ With parents
- ☐ Other _____

History

Employment history

Applicant 1: _____

Current primary job

Nature of employment	Job basis
☐ PAYG	☐ Full time
☐ Self employed	☐ Part time
☐ Unemployed	☐ Contract
☐ Retired	☐ Temporary
☐ Home duties	☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Employer address

Employer phone number

Employer type	Are you on probation?
☐ Private ☐ Public	☐ Yes ☐ No

Date started

MM

YY

Current secondary job

Nature of employment	Job basis
☐ PAYG	☐ Full time
☐ Self employed	☐ Part time
☐ Unemployed	☐ Contract
☐ Retired	☐ Temporary
☐ Home duties	☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Applicant 2: _____

Current primary job

Nature of employment	Job basis
☐ PAYG	☐ Full time
☐ Self employed	☐ Part time
☐ Unemployed	☐ Contract
☐ Retired	☐ Temporary
☐ Home duties	☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Employer address

Employer phone number

Employer type	Are you on probation?
☐ Private ☐ Public	☐ Yes ☐ No

Date started

MM

YY

Current secondary job

Nature of employment	Job basis
☐ PAYG	☐ Full time
☐ Self employed	☐ Part time
☐ Unemployed	☐ Contract
☐ Retired	☐ Temporary
☐ Home duties	☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

History

Employment history

Applicant 1: _____

Current secondary job cont'd

Employer address

Employer phone number

Employer type

☐ Private ☐ Public

Are you on probation?

☐ Yes ☐ No

Date started

Previous job 1

Nature of employment

- ☐ PAYG
- ☐ Self employed
- ☐ Unemployed
- ☐ Retired
- ☐ Home duties

Job basis

- ☐ Full time
- ☐ Part time
- ☐ Contract
- ☐ Temporary
- ☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Employer address

Employer phone number

Employer type

☐ Private ☐ Public

Were you on probation when you left?

☐ Yes ☐ No

Date ended

Applicant 2: _____

Current secondary job cont'd

Employer address

Employer phone number

Employer type

☐ Private ☐ Public

Are you on probation?

☐ Yes ☐ No

Date started

Previous job 1

Nature of employment

- ☐ PAYG
- ☐ Self employed
- ☐ Unemployed
- ☐ Retired
- ☐ Home duties

Job basis

- ☐ Full time
- ☐ Part time
- ☐ Contract
- ☐ Temporary
- ☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Employer address

Employer phone number

Employer type

☐ Private ☐ Public

Were you on probation when you left?

☐ Yes ☐ No

Date ended

History

Employment history

Previous job 2

Nature of employment

☐ PAYG

☐ Self employed

☐ Unemployed

☐ Retired

☐ Home duties

Job basis

☐ Full time

☐ Part time

☐ Contract

☐ Temporary

☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Employer address

Employer phone number

Employer type

☐ Private

☐ Public

☐ Yes

☐ No

Were you on probation when you left?

☐ Yes

☐ No

Date ended

MM

YY

Previous job 2

Nature of employment

☐ PAYG

☐ Self employed

☐ Unemployed

☐ Retired

☐ Home duties

Job basis

☐ Full time

☐ Part time

☐ Contract

☐ Temporary

☐ Casual

Job title

Employer name

Employer contact first name

Employer contact last name

Employer address

Employer phone number

Employer type

☐ Private

☐ Public

☐ Yes

☐ No

Were you on probation when you left?

☐ Yes

☐ No

Date ended

MM

YY

History

Credit history

Have you or any co-applicants had any previous credit issues or bankruptcy?

☐ Yes ☐ No

e.g. Trouble paying back a loan, credit car, monies owing to friends/family etc.

If yes, please provide more details:

Are you or any co-applicants behind in repaying any current debts or loans?

☐ Yes ☐ No

If yes, please provide more details:

Have you or any co-applicants been a director in the past 5 years?

☐ Yes ☐ No

If yes, please provide more details: