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## Mortgage Needs and Arrangement 按揭貸款安排

<b>Applicant</b> 申請人 ▶ <input checked="" type="checkbox"/> <b>Borrower</b> 借款人 <input checked="" type="checkbox"/> <b>Mortgagor</b> 按揭人 (業主)		
<b>Personal Details</b> 個人資料		
Name in English/Name of Company [Must be Non-Trading Company, including its shareholder(s)] 英文姓名 / 公司名稱 (必須為非貿易公司, 包括其股東) <input type="radio"/> Mr 先生 <input type="radio"/> Mrs 太太 <input type="radio"/> Miss 小姐 <input type="radio"/> Ms 女士 <input type="radio"/> Other 其他 Surname 姓 ▼      Given Name 名 ▼		
Name in Chinese 中文姓名		
Hong Kong Identity Card No./ Certificate of Incorporation No. 香港身分證號碼 / 公司註冊證書號碼	*Date of Birth/Date of Incorporation (day/month/year) *出生日期 / 成立日期 (日 / 月 / 年)	Nationality(ies) (Country(ies)/Region(s)) 國籍 (國家 / 地區) (If you have multiple nationalities, please provide up to a maximum of 3 nationalities 如您有多重國籍, 請提供最多 3 個國籍)
Marital Status 婚姻狀況 <input type="radio"/> Single 未婚 <input type="radio"/> Divorced 離婚 <input type="radio"/> Married 已婚 <input type="radio"/> Widowed 鰥寡		Place of Birth 出生地點
Education Level 教育程度 <input type="radio"/> University or above <input type="radio"/> Post-Secondary/Diploma <input type="radio"/> Completed Secondary Post-Secondary/Diploma      預科 / 文憑      中學畢業 大學或以上 <input type="radio"/> Completed Form 5 <input type="radio"/> Others 完成中五      其他		
Present Residential Address 現時住宅地址		



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<b>Personal Details (Continued)</b> 個人資料 (續)		
Email Address 電郵地址		
Mobile/Pager No. 流動電話 / 傳呼機號碼	Home Telephone No. 住宅電話號碼	Office Telephone No. 辦事處電話號碼
<b>Employment Details</b> 就業資料		
Employment Status 職業狀況		
<input type="radio"/> Full-time Employed 全職 <input type="radio"/> Part-time Employed 兼職 <input type="radio"/> Self-Employed 自僱 <input type="radio"/> Housewife 主婦		
<input type="radio"/> Retired 退休 <input type="radio"/> Not Currently Employed 非在職 <input type="radio"/> Student 學生		
Please choose one of the roles below if you are <b>Self-Employed</b> : 如您是自僱人士, 請選擇以下其中一項:		
<input type="radio"/> Business owner ( <i>other than sole proprietorship</i> ) 公司擁有者 (獨資除外) ( <i>Business Owner is a person holding more than 10% ownership of a company</i> 公司擁有者是指該人持有該公司超過 10% 擁有權)		
<input type="radio"/> Key controller 主要管理者 ( <i>Key Controller means senior executive management like CEO, CFO, etc.</i> 主要管理者指公司高級管理層如行政總裁、財務總監等)		
<input type="radio"/> Sole proprietorship 獨資		
Please choose one of the roles below if you are <b>Full-time Employed / Part-time Employed</b> : 如您是全職 / 兼職人士, 請選擇以下其中一項:		
<input type="radio"/> Business owner 公司擁有者 ( <i>Business Owner is a person holding more than 10% ownership of a company</i> 公司擁有者是指該人持有該公司超過 10% 擁有權)		
<input type="radio"/> Key controller 主要管理者 ( <i>Key Controller means senior executive management like CEO, CFO, etc.</i> 主要管理者指公司高級管理層如行政總裁、財務總監等)		
<input type="radio"/> Employee 僱員		
Occupation 職業	Monthly Salary 月薪 <b>HKD</b> 港幣	Job Title ( <i>if applicable</i> ) 工作職位 (如適用)
Name of Employer/Business 僱主 / 公司名稱		
Employer/Business Industry 僱主 / 公司業務		
Present Office Address 現職工作地址		



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### Sources of Wealth 財富來源

Initial and Ongoing Sources of Client's Wealth or Income 初次及持續財富或收入來源

- ☐ Earning from Work 工作收入
- ☐ Earning from Business Interest 商業 / 公司收益
- ☐ Inheritance 資產繼承
- ☐ Return on Investment / Investment Matured 投資收益
- ☐ Earning Given by Spouse 由配偶給予的收入
- ☐ Sale of an Asset (e.g. Car, Property) 資產轉售 (例如：汽車、物業)
- ☐ Personal Savings 個人儲蓄
- ☐ Winning Lottery/Prize Money 博彩獎金
- ☐ Others (please specify) 其他 (請說明) :

Source and Description of Repayment (and Source and Origins of Funds to be Used in the Relationship) 還款資金來源 (及使用資金來源)

- ☐ Cash Deposit 現金存入
- ☐ Cheque Deposit 支票存入
- ☐ Transfer from Other Accounts 戶口轉賬
- ☐ Wire Transfer from Other Banks 來自其他銀行的匯款
- ☐ Others (please specify) 其他 (請說明) :

### Credit Reference (Compulsory) 信用資料 (必須填寫)

Existing Mortgage Loans/Property Secured Overdraft Facility, including Debts in the Capacity as Mortgagor/Borrower/Guarantor

現有按揭貸款 / 物業抵押透支，包括以按揭人 (業主) / 借款人 / 擔保人身分之債務

I do not have mortgage loan or property secured overdraft Facility or related debts. 本人並無任何按揭貸款或物業抵押透支等債務。

I have current mortgage loan(s) or property secured overdraft facility or related debts and the number of facilities are as follows:  
(Please provide related loan repayment schedule, loan agreement, letter of offer, etc.)

本人現有按揭貸款或物業抵押透支等債務，債務數目如下：(請附上有關還款紀錄表 / 合約 / 貸款條件信等文件。)

Borrower: 借款人：	Guarantor: 擔保人：	Mortgagor: 按揭人 (業主)：
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Other Existing Debts (Non Mortgage related) e.g.: Car Loan, Personal Instalment Loans, Revolving Loans, Unsecured Overdraft, Secured Overdraft (Non Property Secured Overdraft Facility), include Debts in the Capacity as Borrower/Guarantor

現有其他債務 (非按揭) 例如：汽車貸款、私人分期貸款、循環貸款、無抵押貸款、抵押透支 (非物業抵押)，包括以借款人 / 擔保人身分之債務

I do not have other debts. 本人並無任何其他債務。

I have the following debts as listed below: (Please provide related loan repayment schedule, loan agreement, letter of offer, etc.)

本人有以下債務：(請附上有關還款紀錄表 / 合約 / 貸款條件信等文件。)

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### Property Details 物業資料

Property Address 物業地址

Room/Flat 室 \_\_\_\_\_ Block 座 \_\_\_\_\_ Floor 樓 \_\_\_\_\_

Name of Building 大廈名稱 \_\_\_\_\_

Name of Estate 屋邨名稱 \_\_\_\_\_

Number and Name of Street/Road 門牌號數及街道名稱 \_\_\_\_\_

District 地區 \_\_\_\_\_



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<b>Property Details (Continued) 物業資料(續)</b>			
Inclusions of Property 物業包括 <input type="checkbox"/> Roof 天臺 <input type="checkbox"/> Flat Roof 平臺 <input type="checkbox"/> Balcony 露臺 <input type="checkbox"/> Garden 花園 <input type="checkbox"/> Terrace 陽臺 <input type="checkbox"/> Car Park: No. 車位：號碼 <input type="checkbox"/> Floor 層數			
Use of Property 物業用途 <input type="checkbox"/> Self-occupancy 自住 <input type="checkbox"/> Intended to be Owner-occupied 不交吉預期作自住 <input type="checkbox"/> Immediate Family Members Use 直系家庭成員居住 <input type="checkbox"/> Parents 父母 <input type="checkbox"/> Children 子女 <input type="checkbox"/> Spouse 配偶 <input type="checkbox"/> Siblings 兄弟姊妹 <input type="checkbox"/> Grandparents or Parents-in-law 祖父母、外祖父母或配偶的父母 <input type="checkbox"/> Investment 投資 <input type="checkbox"/> Rent Out with Tenancy Agreement 出租 <input type="checkbox"/> Vacant / To be Rented Out 交吉 / 即將租 <input type="checkbox"/> Other Family Members Use 其他家庭成員居住 (Other than immediate family members 非直系家庭成員)			

<b>For New Property Purchase Only 只適用於新購買物業</b>			
Purchase Price 買價 <b>HKD 港幣</b>		Property Purchased from 物業購自 <input type="checkbox"/> Primary Market 一手市場 With Developer Incentive Agent 發展商給予回贈 <input type="checkbox"/> Yes 有 Amount 金額 <b>HKD 港幣</b> <input type="checkbox"/> No 否	
Purchase Completion Date 買樓交易完成日期 Day / Month / Year 日 月 年	Vacant Possession upon Completion 物業成交時交吉 <input type="checkbox"/> Yes 是 <input type="checkbox"/> No 否	<input type="checkbox"/> With Real Estate Agent/Property Incentive 地產代理 / 物業代理給予回贈 <input type="checkbox"/> Yes 有 Amount 金額 <b>HKD 港幣</b> <input type="checkbox"/> No 否	

## Mortgage Requirement 按揭貸款資料

<b>Home Loan Arrangement 樓宇按揭安排</b>		
Repayment Frequency 還款周期 <input type="checkbox"/> Monthly; in _____ Instalments and repay _____ day of each _____ 一個月；分 期及於每月第 on month 日還款 <input type="checkbox"/> Fortnightly; in _____ Instalments 兩星期；分 期	Rate Change Option 利率變更時擬採用的還款方法 <input type="checkbox"/> Fixed Loan Tenure 固定年期 <input type="checkbox"/> Fixed Instalment Amount 固定供款額	Loan Amount Request / Home Equity Loan Amount Request 貸款額 / 擬申請樓宇「加按」貸款額 <b>HKD 港幣</b>

## Declaration 聲明

1. I/We confirm that the information given above is correct and agree that the foregoing shall form the basis of any agreement which may hereafter be made. 本人（等）證實上述資料乃正確無誤，並同意以此作為日後達成協議的基礎。
2. I/We declare that the subject property shall be used exclusively for residential purpose in the manner as specified above. 本人（等）聲明該樓宇只作住宅用途，以方式如上所述。
<b>X</b> _____ Signature(s) of Applicant(s) (All Applicants must sign here) 申請人簽署（所有申請人均須簽署） Date: