

# ENQUIRY FORM

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## APPLICANT 1

GIVEN NAME/S	
SURNAME	
D.O.B	
ADDRESS	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
PREVIOUS ADDRESS (IF ABOVE LESS THAN 3 YEARS)	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
HOME PHONE	
WORK PHONE	
MOBILE PHONE	
EMAIL	
MARITAL STATUS	
DEPENDANT (AGE/ DATE OF BIRTH)	

## APPLICANT 2

GIVEN NAME/S	
SURNAME	
D.O.B	
ADDRESS	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
PREVIOUS ADDRESS (IF ABOVE LESS THAN 3 YEARS)	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
HOME PHONE	
WORK PHONE	
MOBILE PHONE	
EMAIL	
MARITAL STATUS	
DEPENDANT (AGE/ DATE OF BIRTH)	

## EMPLOYMENT DETAILS

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### APPLICANT 1

EMPLOYER NAME	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	
GROSS ANNUAL INCOME (excl. super)	
OTHER INCOME (COMMISSION/BONUS)	
PREVIOUS EMPLOYER (IF CURRENT EMPLOYER LESS THAN 3 YEARS)	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	

### APPLICANT 2

EMPLOYER NAME	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	
GROSS ANNUAL INCOME (excl. super)	
OTHER INCOME (COMMISSION/BONUS)	
PREVIOUS EMPLOYER (IF CURRENT EMPLOYER LESS THAN 3 YEARS)	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	

## ASSETS

ITEM	DETAILS	VALUE	OTHER
PROPERTY 1		\$	RENTAL PW: SECURITY TO LOAN: Y <input type="checkbox"/> N <input type="checkbox"/>
PROPERTY 2		\$	RENTAL PW: SECURITY TO LOAN: Y <input type="checkbox"/> N <input type="checkbox"/>
PROPERTY 3		\$	RENTAL PW: SECURITY TO LOAN: Y <input type="checkbox"/> N <input type="checkbox"/>
MOTOR VEHICLE 1 (YEAR/ MAKE/MODEL)		\$	
MOTOR VEHICLE 2 (YEAR/MAKE/MODEL)		\$	
HOME CONTENTS		\$	
APPLICANT 1 SUPER		\$	
APPLICANT 2 SUPER		\$	
SAVINGS		\$	
SHARES & INVESTMENTS		\$	

## LIABILITIES

ITEM	BANK/LENDER	BALANCE OWING	MONTHLY PAYMENT	INTEREST RATE
MORTGAGE 1	Principal & Interest <input type="checkbox"/> OR Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 2	Principal & Interest <input type="checkbox"/> OR Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 3	Principal & Interest <input type="checkbox"/> OR Interest Only <input type="checkbox"/>	\$	\$	%
CAR LOAN/S 1		\$	\$	%
CAR LOAN/S 2		\$	\$	%
OTHER LOAN/S		\$	\$	%
CREDIT CARD 1		\$	LIMIT \$	
CREDIT CARD 2		\$	LIMIT \$	
CREDIT CARD 3		\$	LIMIT \$	

## DESIRED LOAN FEATURES - APPLICANT 1 & APPLICANT 2

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- Variable Rate
- Fixed Rate
- Combined, Variable & Fixed
- Interest Only
- Internet Banking
- Offset account
- Redraw
- Line of Credit
- Credit Card
- Additional Repayments
- Portability Loan Variations
- Branch access

If selected Interest Only, please set out why you would like Interest Only repayments (mandatory eld):

If selected Fixed Rate, please explain why you would like fixed rate period (mandatory eld):

Any preferred lenders? Any lenders you do not wish to deal with? Preferred loan splits?

## YOUR FINANCIAL SECURITY - APPLICANT 1 & APPLICANT 2

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Have you ever had financial judgments or legal proceedings against you?	YES	NO
Did you have any difficulty meeting financial commitments in the past 2 years?	YES	NO
Are any of your existing debts currently in arrears?	YES	NO
Are you concerned about rising interest rates? How concerned are you?	YES	NO
Do you expect any significant change to your financial situation in the foreseeable future that would adversely impact your ability to meet your commitments?	YES	NO
How do you expect to meet your commitments?		

## PROTECTING YOUR LIFESTYLE - APPLICANT 1 & APPLICANT 2

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Do you have any insurance to protect your lifestyle eg.life, total permanent disablement insurance, income protection, etc? YES      NO

If No, how would your lifestyle needs be maintained if you and/or your partner were:

- a) Temporarily unable to earn an income, for example through sickness/illness?
- b) Permanently unable to earn income, for example through death/permanent disability?

Would you like someone to contact you regarding life insurance? Do you have YES      NO  
home and contents insurance? YES      NO

Have you received advice from an accountant, solicitor and financial planner regarding your requirement financial objectives? YES      NO

If Yes, please provide details:

## GENERAL LIVING AND ENTERTAINMENT EXPENSES

EXPENSE CATEGORY	DESCRIPTION	MONTHLY AMOUNT
Primary Residence Costs (excluding insurance)	Includes home maintenance and repairs, electricity, gas, water, garden maintenance, council rates, housekeeper, other	
Telephone, Internet, Pay TV & Media Streaming Subscriptions	Includes landline, internet, mobile phone, subscription services (e.g. Foxtel), other	
Transport	Includes, vehicle registration, fuel, vehicle maintenance, roadside assist, parking & tolls, public transport, taxi/ ride-sharing services, vehicle rentals/car-sharing services, other	
Groceries	Includes, grocery shopping including alcohol, restaurants and cafes, takeaway/delivery, other	
Clothing & Personal Care	Includes clothes & shoes, hair & beauty, other	
Recreation and Entertainment	Includes lifestyle and culture, newspapers/magazines/books, sports, hobbies, memberships (gym, fitness courses), gifts, holidays & airfares, donations, other	
Higher Education & Vocational Training (excluding HECS/HELP)	Self-education/professional development, pets, other	
Childcare	Childcare/pre-school/kinder, babysitting/nanny/au-pair	
Child support	Child Support or Maintenance payments	
Medical & Health (excluding Health Insurance)	Includes doctor, pharmacy, dentist, optical, physio/remedial/chiro/alternative therapies, other	

## GENERAL LIVING AND ENTERTAINMENT EXPENSES

EXPENSE CATEGORY	DESCRIPTION	MONTHLY AMOUNT
General Insurance (Including Home & Contents on Primary O/Occ Residence)	Includes income protection insurance, business insurance, building/home/contents insurance, vehicle insurance, travel insurance, ambulance cover, health insurance.	
Other Insurances	Other insurance not captured elsewhere	
Other Regular and Recurring Expenses	Unique items not covered in above categories (must be explained further).	

## ADDITIONAL EXPENSES

EXPENSE CATEGORY	DESCRIPTION	MONTHLY AMOUNT
O/Occ Strata, Body Corporate, Land Tax	Strata Fees /Body Corporate Fees (for owner occupied/primary residence excluding investment property)	
Private/non government school fees	Private/non government school fees (includes school, tuition and sport fees for private schooling)	
Child & Spouse Maintenance	Child support/maintenance payments	
Personal Insurance (Life, Health, Sickness and Personal Accident)	Life/accident/illness insurance (excluding insurances captured under general insurance, other insurance and those held in Superannuation).	
Investment Property Costs (including Insurance)	Home maintenance and repairs; Land tax/body corporate/Strata Fees; Building/Home/Contents Insurance; Garden maintenance; Property Management; Landlord insurance; Council rates; Housekeeper; Investment Utilities; Other	

## ADDITIONAL EXPENSES

EXPENSE CATEGORY	DESCRIPTION	MONTHLY AMOUNT
Secondary Residence and Holiday home costs (including insurance)	Housing and property expenses on secondary residence including rates, taxes, levies, body corporate and strata fees, repairs and maintenance, other household items and utilities (excluding insurance, telephone, internet and pay TV as they are categorised separately).	
Rent	Rent/board if continuing post loan	

For the new home loan repayment, what is account detail would you want to use for the repayment and how often:

Bank	
BSB	
Account Number	
Weekly/Fortnightly/Monthly	