

ENQUIRY FORM

APPLICANT 1

FULL NAME (Incl middle name)	
DATE OF BIRTH	
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	
MOTHERS MAIDEN NAME	
CHILDREN (Under 18) Date of birth	

APPLICANT 2

FULL NAME (Incl middle name)	
DATE OF BIRTH	
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	
MOTHERS MAIDEN NAME	
CHILDREN (Under 18) Date of birth	

EMPLOYMENT DETAILS

APPLICANT 1

EMPLOYER NAME	
EMPLOYMENT TYPE (Full/Part Time, Casual/ Self Employed)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	
CONTACT NAME	
GROSS ANNUAL INCOME (excl. super)	
OTHER INCOME (Commission/Bonus)	
PREVIOUS EMPLOYER (If current employer less than 3 years)	
PREVIOUS EMPLOYER ADDRESS	
EMPLOYMENT TYPE (Full/Part Time, Casual/ Self Employed)	
DATE STARTED	

APPLICANT 2

EMPLOYER NAME	
EMPLOYMENT TYPE (Full/Part Time, Casual/ Self Employed)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	
CONTACT NAME	
GROSS ANNUAL INCOME (excl. super)	
OTHER INCOME (Commission/Bonus)	
PREVIOUS EMPLOYER (If current employer less than 3 years)	
PREVIOUS EMPLOYER ADDRESS	
EMPLOYMENT TYPE (Full/Part Time, Casual/ Self Employed)	
DATE STARTED	

SELF EMPLOYED

Are you a Director
of a company?

Yes
No

If you answered yes, please list the current
directorships below:

ASSETS

ITEM	DETAILS	VALUE	OTHER
PROPERTY 1		\$	Weekly Rental \$
PROPERTY 2		\$	Weekly Rental \$
PROPERTY 3		\$	Weekly Rental \$
PROPERTY 4		\$	Weekly Rental \$
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"/> Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 2	Principal & Interest <input type="checkbox"/> Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 3	Principal & Interest <input type="checkbox"/> Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 4	Principal & Interest <input type="checkbox"/> 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 \$	
HECS/HELP		\$	\$	

LIVING EXPENSES

On a monthly basis, how much would you anticipate you spend on the following items?

If zero, please provide a comment

ITEM	MONTHLY AMOUNT	COMMENTS
CHILDCARE	\$	
CHILD & SPOUSE MAINTENANCE	\$	
CLOTHING & PERSONAL CARE	\$	
PUBLIC & GOVT SCHOOL	\$	
HIGHER EDUCATION, UNI, TERTIARY	\$	
PRIVATE & NON GOVT EDUCATION	\$	
GROCERIES	\$	
GENERAL INSURANCE	\$	
PERSONAL, LIFE, INCOME INSURANCE	\$	
OTHER INSURANCE	\$	
INVESTMENT PROPERTY EXPENSES	\$	
PRIMARY RESIDENCE COSTS	\$	
SECONDARY RESIDENCE & HOLIDAYS	\$	
O/OCC STRATA, BODY CORP, LEVIES	\$	
MEDICAL & HEALTH COSTS	\$	
OTHER REGULAR EXPENSES	\$	
RECREATION & ENTERTAINMENT	\$	
RENT	\$	
BOARD	\$	
PHONE, INTERNET, PAY TV ETC	\$	
TRANSPORT	\$	
TOTAL LIVING EXPENSES	\$	

YOUR LENDING PROFILE

What is the amount you would like to apply for?

\$

If purchasing, what is the expected purchase price?

\$

How long do you expect to retain the home loan for?

1-2 yrs

10+ yrs

2-5 yrs

Unsure

5-10 yrs

What type of home loan repayment are you considering?

Principle & Interest

Interest Only

Unsure

PURPOSE OF THE LOAN	TICK	COMMENTS Do you have an objective for seeking this loan?
PURCHASE HOME	<input type="checkbox"/>	
INVESTMENT PROPERTY	<input type="checkbox"/>	
RENOVATIONS	<input type="checkbox"/>	
REFINANCE	<input type="checkbox"/>	
OTHER	<input type="checkbox"/>	