

Loan Preparation Form

	APPLICANT 1	APPLICANT 2
* PERSONAL DETAILS		
* Full Name		
Preferred Name		
* Mobile Number		
* Email Address		
* Marital Status	☐ Single ☐ De Facto ☐ Married ☐ Divorced	☐ Single ☐ De Facto ☐ Married ☐ Divorced
* Number of Dependants		
* Age of Dependants		
* Current Address		
* Current Address Start Date	DD / MM / YYYY	DD / MM / YYYY
* Housing Status	☐ Owned ☐ Renting ☐ Mortgaged ☐ Boarding	☐ Owned ☐ Renting ☐ Mortgaged ☐ Boarding
* Previous Address (if current address is less than three years)		
* Previous Housing Status	☐ Owned ☐ Renting ☐ Mortgaged ☐ Boarding	☐ Owned ☐ Renting ☐ Mortgaged ☐ Boarding
* Previous Address Start & End Date	Start: DD / MM / YY End: DD / MM / YY	Start: DD / MM / YY End: DD / MM / YY
* CURRENT EMPLOYMENT		
* Type of Employment	☐ PAYG ☐ Self-employed ☐ Unemployed	☐ PAYG ☐ Self-employed ☐ Unemployed
* Status (if PAYG)	☐ Full-time ☐ Part-time ☐ Casual ☐ Contractor	☐ Full-time ☐ Part-time ☐ Casual ☐ Contractor
* Probation	☐ Yes ☐ No	☐ Yes ☐ No
* Employer Name		
* Employer Address		
* Position		
* Employer Contact Name		
* Employer Contact Number		
* Start Date	DD / MM / YYYY	DD / MM / YYYY
* PREVIOUS EMPLOYMENT (if current employment is less than three years)		
* Type of Employment	☐ PAYG ☐ Self-employed ☐ Unemployed	☐ PAYG ☐ Self-employed ☐ Unemployed
* Status (if PAYG)	☐ Full-time ☐ Part-time ☐ Casual ☐ Contractor	☐ Full-time ☐ Part-time ☐ Casual ☐ Contractor
* Employer Name		
* Employer Address		
* Position		
* Employer Contact Name		
* Employer Contact Number		
* Employment Start & End Date	Start: DD / MM / YY End: DD / MM / YY	Start: DD / MM / YY End: DD / MM / YY
* SELF-EMPLOYED BORROWERS (if applicable)		
* Name of Business		
* ABN		
* Describe the company by covering: - Its activities and services - Website and social media - Business generation strategies - Client base - Performance and growth outlook - Business account		

ASSETS & LIABILITIES	DESCRIPTION	OWNERSHIP	VALUE	LOAN LIMIT	LOAN BALANCE	LENDER	RATE	MONTHLY REPAYMENT
Property 1	Address	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Property 2	Address	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Property 3	Address	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Property 4	Address	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Vehicle 1	Make Model Year	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Vehicle 2	Make Model Year	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Company Vehicle 1	Make Model Year	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Company Vehicle 2	Make Model Year	☐ Applicant 1 ☐ Applicant 2	\$	\$	\$		%	\$
Savings 1	Bank Name	☐ Applicant 1 ☐ Applicant 2	\$					
Savings 2	Bank Name	☐ Applicant 1 ☐ Applicant 2	\$					
Banking Relationship	Bank Name	☐ Applicant 1 ☐ Applicant 2	\$					
Superannuation 1	Super Fund Name	☐ Applicant 1 ☐ Applicant 2	\$					
Superannuation 2	Super Fund Name	☐ Applicant 1 ☐ Applicant 2	\$					
Shares		☐ Applicant 1 ☐ Applicant 2	\$					
Home Contents		☐ Applicant 1 ☐ Applicant 2	\$					
Other Assets	Description	☐ Applicant 1 ☐ Applicant 2	\$					
Personal Loan 1	Lender Name	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
Personal Loan 2	Lender Name	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
Credit Card 1	Bank Name	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
Credit Card 2	Bank Name	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
Credit Card 3	Bank Name	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
HECS/HELP 1		☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
HECS/HELP 2		☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
Other Liability 1	Description	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
Other Liability 2	Description	☐ Applicant 1 ☐ Applicant 2		\$	\$			\$
TOTAL			\$	\$	\$			\$

MONTHLY LIVING EXPENSES	APPLICANT 1	APPLICANT 2	DESCRIPTION
Will you rent/board/live with parents/family for free after settlement?			
	☐ Yes ☐ No	☐ Yes ☐ No	
Ongoing Rental Expenses	\$	\$	
Basic Living Expenses	\$	\$	Grocery, Transport, Utility, Clothing
NON-BASIC MONTHLY LIVING EXPENSES			
Child Maintenance	\$	\$	Child support payments
Private Health Insurance	\$	\$	Private health, life, protection
Private Education	\$	\$	Tuition fees, activities
Investment Property Expenses	\$	\$	Council, strata, water, tax, repairs
Other	\$	\$	
TOTAL LIVING EXPENSES	\$	\$	

BROKER USE ONLY - LOAN RECOMMENDATION

	* LENDER	* PRODUCT	* LOAN AMOUNT	NOTES
Loan 1				
Loan 2				
Loan 3				
Loan 4				
Loan 5				