

## LOAN ENQUIRY FORM

ESTIMATED LOAN AMOUNT \$		
	APPLICANT 1	APPLICANT 2
<b>TITLE:</b> Mr / Mrs / Ms / Miss / Dr		
<b>FIRST NAME:</b>		
<b>MIDDLE NAME(S):</b>		
<b>SURNAME:</b>		
<b>MOTHER'S MAIDEN NAME:</b>		
<b>PREVIOUS SURNAME:</b>		
<b>CURRENT RESIDENTIAL ADDRESS:</b>		
<b>TIME AT CURRENT ADDRESS:</b>		
<b>PREVIOUS RESIDENTIAL ADDRESS/S:</b>		
<b>TIME AT PREVIOUS ADDRESS:</b> ( <u>must</u> have 3 years address history)		
<b>PHONE NUMBERS:</b>	<b>Work</b> <b>Home</b> <b>Mobile</b>	
<b>EMAIL ADDRESS:</b>		
<b>DATE OF BIRTH:</b>		
<b>DRIVERS LICENCE No. &amp; Expiry Date:</b>		
<b>MARITAL STATUS</b>		
<b>Name of Dependants &amp; DOB:</b>		

### EMPLOYMENT DETAILS

<b>OCCUPATION / POSITION:</b>		
<b>EMPLOYER'S NAME:</b>		
<b>EMPLOYER'S ADDRESS &amp; PHONE:</b>		
<b>TIME EMPLOYED</b>		
<b>SALARY – weekly / fortnightly / annual</b>	\$	\$
<b>PREVIOUS OCCUPATION / POSITION:</b>		
<b>PREVIOUS EMPLOYER'S NAME:</b> Previous Employers Address & Ph No:		
<b>TIME EMPLOYED</b> ( <u>must</u> have 3 years employment history)		

### REAL ESTATE ADDRESS DETAILS

<b>HOME:</b>	
<b>INVESTMENT PROPERTY 1</b>	
<b>INVESTMENT PROPERTY 2</b>	
<b>INVESTMENT PROPERTY 3</b>	

### REAL ESTATE ASSET & LIABILITY

ASSET	VALUE	RENTAL INCOME	LENDER	MONTHLY REPAYMENTS	AMOUNT OWING
<b>HOME:</b>	\$	\$		\$	\$
<b>INVST 1</b>	\$	\$		\$	\$
<b>INVST 2</b>	\$	\$		\$	\$
<b>INVST 3</b>	\$	\$		\$	\$

### OTHER ASSETS

Vehicle	\$	Make:	Model:	Year
Vehicle	\$	Make:	Model:	Year
Savings	\$	Bank:		
Shares	\$	Company:		
Superannuation	\$	Institution:		
Superannuation	\$	Institution:		
Home Contents	\$			
Other	\$	Description:		

### OTHER LIABILITIES

LIABILITIES	MONTHLY PAYMENTS	BALANCE OUTSTANDING	LIMIT	LENDER
<b>RENT</b>	\$			
<b>CREDIT CARD</b>	\$	\$	\$	
<b>CREDIT CARD</b>	\$	\$	\$	
<b>CREDIT CARD</b>	\$	\$	\$	
<b>PERSONAL LOAN</b>	\$	\$	\$	
<b>PERSONAL LOAN</b>	\$	\$	\$	
<b>OTHER:</b>	\$	\$	\$	
<b>OTHER:</b>	\$	\$	\$	

- Please include details of ALL credit card, store cards, interest free cards, car loans

## SECURITY DETAILS

<b>SECURITY ADDRESS:</b>	
<b>PROPERTY VALUE:</b>	\$
<b>TYPE OF PROPERTY: Unit, Land, House, etc</b>	
<b>CONTACT FOR VALUER:</b>	
<b>PURCHASE/REFINANCE/CONSTRUCTION</b>	

## IMPORTANT INFORMATION

<b>Are you a First Home Buyer?</b>	<b>YES / NO</b>
<b>Are you an Australian or NZ permanent Resident or Citizen?</b>	<b>YES / NO</b>
<b>Have you included all of your debts in the liabilities section?</b>	<b>YES / NO</b>
<b>Have you missed a payment on any debts in the last 6 months?</b>	<b>YES / NO</b>
<b>Have you ever had a default, judgment or been bankrupt?</b>	<b>YES / NO</b>
<b>Would you like us to recommend a conveyancer (purchases only)?</b>	<b>YES / NO</b>
<b>Would you like a free superannuation health check?</b>	<b>YES / NO</b>
<b>Would you like to find out more about income protection insurance?</b>	<b>YES / NO</b>
<b>Would you like a quote for home and content insurance?</b>	<b>YES / NO</b>

## NOTES

## Estimate of Income and Expenses for the Month

### INCOME

Item	Weekly	Fortnightly	Monthly	Annual Total
Salary or Wages (after tax)	\$	\$	\$	\$
Pension / Government Allowance	\$	\$	\$	\$
Child Support / Maintenance	\$	\$	\$	\$
Investment Income	\$	\$	\$	\$
Other Income	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

### EXPENSES

Debt Repayments	Weekly	Fortnightly	Monthly	Annual Total
Mortgage / Rent	\$	\$	\$	\$
Car Loan	\$	\$	\$	\$
Personal Loan	\$	\$	\$	\$
Credit and Store Cards	\$	\$	\$	\$
Taxes on Investments	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

Household Expenses	Weekly	Fortnightly	Monthly	Annual Total
Rates (Land / Water)	\$	\$	\$	\$
Body Corporate Fees	\$	\$	\$	\$
Repairs and Maintenance	\$	\$	\$	\$
Gardening / Lawn Mowing	\$	\$	\$	\$
Cleaning (house / Pool)				
Utilities (Gas / Electricity etc)	\$	\$	\$	\$
Household Purchases				
Groceries				
Telephone – Fixed				
Telephone – Mobile				
Internet Access / Pay TV				
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

Motor Vehicle / Transport	Weekly	Fortnightly	Monthly	Annual Total
Fuel	\$	\$	\$	\$
Repairs	\$	\$	\$	\$
Lease	\$	\$	\$	\$
Registration	\$	\$	\$	\$
Parking	\$	\$	\$	\$
Fares / Public Transport				
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

Education	Weekly	Fortnightly	Monthly	Annual Total
HECS	\$	\$	\$	\$
School Fees & Expenses	\$	\$	\$	\$
TAFE Fees	\$	\$	\$	\$
Tuition	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>Person Expenses</b>	<b>Weekly</b>	<b>Fortnightly</b>	<b>Monthly</b>	<b>Annual Total</b>
Clothing & Shoes	\$	\$	\$	\$
Hair & Beauty	\$	\$	\$	\$
Dry Cleaning	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>Medical Expenses</b>	<b>Weekly</b>	<b>Fortnightly</b>	<b>Monthly</b>	<b>Annual Total</b>
Doctor	\$	\$	\$	\$
Dentist	\$	\$	\$	\$
Medicines	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>Insurances</b>	<b>Weekly</b>	<b>Fortnightly</b>	<b>Monthly</b>	<b>Annual Total</b>
Home & Contents	\$	\$	\$	\$
Building	\$	\$	\$	\$
Car	\$	\$	\$	\$
Health	\$	\$	\$	\$
Income Protection	\$	\$	\$	\$
Life				
Other (Boat / Caravan / Trailer)				
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>Savings</b>	<b>Weekly</b>	<b>Fortnightly</b>	<b>Monthly</b>	<b>Annual Total</b>
Personal Super Contributions	\$	\$	\$	\$
Regular Savings	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>Other Expenses</b>	<b>Weekly</b>	<b>Fortnightly</b>	<b>Monthly</b>	<b>Annual Total</b>
Child Care	\$	\$	\$	\$
Child Support Payments	\$	\$	\$	\$
Children's Activities	\$	\$	\$	\$
Gifts	\$	\$	\$	\$
Hobbies & Sports	\$	\$	\$	\$
Magazines & Newspapers	\$	\$	\$	\$
Memberships / Subscriptions	\$	\$	\$	\$
Pet Expenses	\$	\$	\$	\$
Restaurants / Take Away	\$	\$	\$	\$
Alcohol / Cigarettes	\$	\$	\$	\$
Holidays	\$	\$	\$	\$
Other	\$	\$	\$	\$
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>Total Income</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>
<b>Total Expenses</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>
<b>SURPLUS</b> (total income – total expenses)	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>