



**APPLICANT ONE (1) AND TWO (2) PERSONAL ASSETS & LIABILITIES**

DO NOT INCLUDE ANY BUSINESS RELATED ASSETS OR LIABILITIES

**ASSETS**

**LIABILITIES**

Current Property Address:		Lender:	
	Postcode:	Since: / /	Variable / Fixed Fixed Time Remaining:
Value: \$	Rent Received (if applic): \$	Owing: \$	Monthly Payment: \$
Original Purchase Price: \$	Owned Since / /	Any missed payments In past 6 months Y / N	Are all payments up-to-date Y / N
Other Property Address:		Lender:	
	Postcode:	Since: / /	Variable / Fixed Fixed Time Remaining:
Value: \$	Rent Received: \$	Owing: \$	Monthly Payment: \$
Original Purchase Price: \$	Owned Since / /	Any missed payments In past 6 months Y / N	Are all payments up-to-date Y / N
Other Property Address:		Lender:	
	Postcode:	Since: / /	Variable / Fixed Fixed Time Remaining:
Value: \$	Rent Received: \$	Owing: \$	Monthly Payment: \$
Original Purchase Price: \$	Owned Since / /	Any missed payments In past 6 months Y / N	Are all payments up-to-date Y / N
Your Primary (day-to-day) Bank:		Credit Card Provider:	
Balance: \$		Limit: \$	Balance: \$
Your Other Account/Bank:		Credit Card Provider:	
Balance: \$		Limit: \$	Balance: \$
Your Other Account/Bank:		Credit Card Provider:	
Balance: \$		Limit: \$	Balance: \$
Current Motor Vehicle 1: Make:	Year: Model:	Lender (if applic):	Secured against car: Y / N
Value: \$		Owing: \$	Any missed payments in past 6 months Y / N
Owned Since / /	Original Purchase Price \$	Monthly Payment: \$	Months Remaining:
Current Motor Vehicle 1: Make:	Year: Model:	Lender (if applic):	Secured against car: Y / N
Value: \$		Owing: \$	Any missed payments in past 6 months Y / N
Owned Since / /	Original Purchase Price \$	Monthly Payment: \$	Months Remaining:
Home Contents:	\$	Store Card Provider:	
Total Combined Superannuation:	\$	Limit: \$	Balance: \$
Shares / Investments:	\$	Personal/Unsecured Loan Provider:	
Other:	\$	Balance: \$	

**APPLICANT ONE (1) AND TWO (2) PERSONAL ONGOING COMMITMENTS**

DO NOT INCLUDE ANY ONGOING "BUSINESS" COMMITMENTS

Ongoing Monthly Rent:	\$	Other:	\$
Private School Fees:	\$	Other:	\$
Private Health Insurance:	\$	Other:	\$
Have you had any difficulty meeting your financial commitments in the past two (2) years:		Y / N	
Have you received financial advice from an accountant or adviser in regards to your objectives:		Y / N	
Do you anticipate any material changes to your financial situation:		Y / N	
If yes to any of the above, please comment...			

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**APPLICANT ONE (1) AND TWO (2) BUSINESS ASSETS & LIABILITIES**

ONLY APPLICABLE FOR BUSINESS RELATED ASSETS &amp; LIABILITIES

ASSETS		LIABILITIES	
Property 1:	\$	Mortgage Loan 1:	\$
Property 2:	\$	Mortgage Loan 2:	\$
Vehicle 1:	\$	Vehicle Finance 1:	\$
Vehicle 2:	\$	Vehicle Finance 2:	\$
Bank Account 1:	\$	Business Credit Card 1:	\$
Bank Account 2:	\$	Business Credit Card 2:	\$
Machinery/Equipment:	\$	Equipment Finance:	\$
Tools:	\$	Business Loan:	\$
Business Value:	\$	Tax Debt:	\$
Other Asset/s:	\$	Other Debt:	\$
Have you had any difficulty meeting your business financial commitments in the past two (2) years:			Y / N
Do you have a current arrangement (ie payment plan) to repay tax owed to the ATO:			Y / N
if yes, what are the plan arrangements: \$		per month for	months
		Payments up-to-date?	Y / N
Do you anticipate any material changes to your business, the structure or forecasted revenue:			Y / N
If yes to any of the above, please comment...			

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**APPLICANT ONE (1) AND TWO (2) REQUIREMENTS & OBJECTIVES**

What type of loan do you require:

What is the purpose of the loan:

How much do you need to borrow: \$

Preferably over how long:

months

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**PROPERTY SECURITY**

Address:

Postcode:

Property Value: \$

Type:

Description (dwelling size, land size, no. bedrooms, etc):

Best contact for access - Name:

Phone:

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**VEHICLE SECURITY**

Year:

Make:

Model:

Sub-Model:

Sed / Wagon / Util / Oth

4wd / 2wd

No. Cyl:

Auto / Man

Colour:

Petrol/Diesel

Reg No:

Vin No:

Engine No:

Value: \$

Deposit/Trade-in (if applic): \$

Pref. Residual:

%

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**OTHER SECURITY**

Description:

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**LOAN PREFERENCES – Please identify any preferences you have. If no preferences then leave blank.**

Variable / Fixed (Fixed Term : yrs)

Principal &amp; Interest / Interest Only (Interest only for yrs)

Repayment Method: Direct Debit / Direct Credit / Capitalised / Other

Frequency: Weekly / Fortnightly / Monthly / Paid in Advance

Split the total loan in to:

Split Loan 1: \$

Fixed / Var

Split Loan 2: \$

Fixed / Var

Other Loan Features:

Redraw - Offset Account - Loan Portability - Line of Credit - Cheque Access - Branch Access - Other

Please specify any other needs or requirements: