

# Loan Information Collection sheet



You can fill in the form electronically by tabbing into a field (or clicking into it) and then typing the information. Once you have filled in as many fields as you want, save the file and send it back to me via email



If you would rather complete the form by hand, print out the document and complete as many fields as you want. The information can then be sent via mail or scanned and emailed



Once you have entered the information and have sent this back to me, I will start investigating loan options. Please be aware that the details captured here represent a portion of the information that may be required to make an informed recommendation about which loan is appropriate for you. I will contact you shortly to ensure that I have a thorough understanding of your requirements and your financial position.

## Section 1



### Information about you...

#### Borrower #1

Mr  Mrs  Miss  Ms  Other \_\_\_\_\_

First name \_\_\_\_\_

Last name \_\_\_\_\_


 mobile \_\_\_\_\_

@ email \_\_\_\_\_

 home \_\_\_\_\_

 work \_\_\_\_\_

Please indicate your preferred contact method (tick)

  @    



#### Current Residential Address

Street \_\_\_\_\_

Is this your own home?  Yes  No

Suburb \_\_\_\_\_

Are you renting this home?  Yes  No

State \_\_\_\_\_ Postcode \_\_\_\_\_

Date of occupation \_\_\_\_\_

#### Borrower #2

Mr  Mrs  Miss  Ms  Other \_\_\_\_\_

First name \_\_\_\_\_

Last name \_\_\_\_\_


 mobile \_\_\_\_\_

@ email \_\_\_\_\_

 home \_\_\_\_\_

 work \_\_\_\_\_

Please indicate your preferred contact method (tick)

  @    



#### Current Residential Address Indicate if details are the same as above Same as above

Street \_\_\_\_\_

Is this your own home?  Yes  No

Suburb \_\_\_\_\_

Are you renting this home?  Yes  No

State \_\_\_\_\_ Postcode \_\_\_\_\_

Date of occupation \_\_\_\_\_

## Section 2 - Assets



### Property Assets

Do you (or co-applicant) own any property? (house / unit / land)  Yes  No (go to "Other Assets")

Property address (if this is the property you live in, indicate as "residential address")

Street \_\_\_\_\_

Suburb \_\_\_\_\_

State \_\_\_\_\_ Postcode \_\_\_\_\_

Property Type (tick box to indicate type)

House  Unit

Vacant land

Property Value  Is this your estimate?

\$ \_\_\_\_\_  Is it a certified valuation?

Do you own any other properties?  Yes  No

### Other Assets



#### Motor Vehicle(s)

Model and Manufacturer (#1)

\_\_\_\_\_

Year of production

\_\_\_\_\_

Estimated value

\$ \_\_\_\_\_

Model and Manufacturer (#2)

\_\_\_\_\_

Year of production

\_\_\_\_\_

Estimated value

\$ \_\_\_\_\_



#### Savings / Shares / Superannuation

Institution / Bank / Portfolio

\_\_\_\_\_

Product (tem deposit etc)

\_\_\_\_\_

Estimated value

\$ \_\_\_\_\_

Institution / Bank / Portfolio

\_\_\_\_\_

Product (tem deposit etc)

\_\_\_\_\_

Estimated value

\$ \_\_\_\_\_

Institution / Bank / Portfolio

\_\_\_\_\_

Product (tem deposit etc)

\_\_\_\_\_

Estimated value

\$ \_\_\_\_\_

## Section 3 - Debts



### Existing Mortgages (if there are no mortgages, complete next debt section)

Institution / Bank	Limit	Amount owing	Repayments per month
_____	\$ _____	\$ _____	\$ _____
Is this mortgage being refinanced?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Ownership percentages	Borrower 1 % _____ Borrower 2 % _____
<b>Note:</b> If this is your owner occupied property, tick the box. Otherwise enter property address	Is this your Owner occupied property? <input type="checkbox"/> Yes <input type="checkbox"/> No	Street	_____
		Suburb	_____
		State	_____ Postcode _____



### Credit Cards / Store Cards

1. Financial Institution / Creditor	Limit	Amount Owing	Repayments per month
_____	\$ _____	\$ _____	\$ _____
Is this debt being refinanced?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Ownership percentages	Borrower 1 % _____ Borrower 2 % _____
2. Financial Institution / Creditor	Limit	Amount Owing	Repayments per month
_____	\$ _____	\$ _____	\$ _____
Is this debt being refinanced?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Ownership percentages	Borrower 1 % _____ Borrower 2 % _____
3. Are there any other credit / store cards not listed? <input type="checkbox"/> Yes <input type="checkbox"/> No			



### Other loans, leases or debts

1. Financial Institution / Creditor	Limit	Amount Owing	Repayments per month
_____	\$ _____	\$ _____	\$ _____
Is this debt being refinanced?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Ownership percentages	Borrower 1 % _____ Borrower 2 % _____
2. Are there any other credit / store cards not listed? <input type="checkbox"/> Yes <input type="checkbox"/> No			

## Section 4 – loan requirements

What's important in your loan?



**Requirements / Purpose** (what do you need the loan for?)

**Click or tick all the features that are important**

- Online / internet banking
- Being able to redraw excess funds
- Stability / consistency in repayments
- Having all my accounts linked
- Allowing savings to reduce interest (offset savings)
- Ability to make extra repayments
- Low fees and charges
- Just need a simple loan account
- Being able to split the loan products
- Other (specify) \_\_\_\_\_

**Lender Preferences** (are there any financial institutions that you like or dislike)

Are you a first home buyer?  Yes  No



**Approximate income per annum**

Borrower 1 \$ \_\_\_\_\_

Borrower 2 \$ \_\_\_\_\_



**Approximate cash deposit**

\$ \_\_\_\_\_



Please return to me as an email attachment (preferred) option) once filled in electronically. If this information sheet has been printed and completed by hand, please scan and send via email where possible.