

# Application Form



Referrer				Consultant		
Make	Model	Asset Type	New/Used/Refinance etc			
Vendor	Year			Other info		

Purchase Price	Deposit	Trade in	Payout			
Lender	Product	Frequency	Preferred Term - Years			
Insurances	DOF	Lender Fee	PPSR			
Amount to finance	Residual	Payment	Rate			

Application Entity
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Company Name	A.B.N.		A.C.N.	
Date Started Trading	GST Registered Date	# of Directors?	# of Shareholders over 25%+	

Trust Name	Trust A.B.N.		Settlor	
Beneficiary 1 Name	DOB	Address	Licence #	
Beneficiary 2 Name	DOB	Address	Licence #	

Trading Address		
Suburb		
State	Postcode	
Ownership?		
Duration (in years)	(and months)	

<i>PREVIOUS TRADING ADDRESS - If less than 3 years in current</i>			
Street Address			
Suburb			
State	Postcode		
Duration (in years)	(and months)		

Additional Notes			
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**SECONDARY Applicant/Guarantor**

First Name			
Second Name			
Surname			
Gender		D.O.B	
Drivers License No.		Licence State	
Date Licence Expiry		Medicare #	
Marital Status		Dependents	
Dependant Ages		Listed on Medicare	

Street Address			
Suburb			
Residence Type		State	
Duration (in years)		Postcode	
(and months)			
Landlord/Mortgage			
Phone Number		Citizen/Permanent Res?	
Politically Exposed?		If no, what Visa Status?	

CONTACT DETAILS	
Email Address	
Home Phone No.	
Business Phone No.	
Mobile No.	

PREVIOUS ADDRESS - If less than 3 years in current	
Street Address	
Suburb	
Duration (in years)	State
(and months)	Postcode

EMPLOYMENT DETAILS	
Current Employer	
Occupation	
Street Address	
Suburb	
Sole Trader ABN:	State
ABN Reg From:	Postcode
GST From:	Phone Number
Contact Person	
Time in Job (in yrs)	Years in Industry
(and months)	Employ Type?
<i>PREVIOUS EMPLOYMENT - If less than 3 years in current</i>	
Previous Employer	
Occupation	
Time in Job (in yrs)	(and months)

PERSONAL/RELATIVE REFERENCE	
Name	
Street Address	
Suburb	
	State
Phone Number	Postcode

FINANCE REFERENCES	
Finance Reference	
Account No.	

ACCOUNTANT INFORMATION	
Accountant's Firm	
Accountant's Name	
Accountant's Email	
Phone Number	

BANK DETAILS	
Bank	Branch
BSB	Acc't No.

MONTHLY INCOME	\$
Monthly Income (after tax)	
Rental Income	
Child Support	
Family Tax A & B	
Centrelink Benefits	
Spousal Income?	
<b>TOTAL MONTHLY INCOME</b>	

MONTHLY EXPENDITURE	\$
Rent/Board	
General Living Expenses "GLE" e.g. Groceries incl. Supermarket Purchases, Butcher, Greengrocer, Bakery, Clothing, Utilities	
Discretionary Expenses e.g. Internet, Pay TV, Mobiles, Gym, etc.	
Insurances e.g. Car, Health, Personal, Life Cover	
Transport - Servicing, Petrol, Rego & Public Transport	
Entertainment - Holidays, Gifts, Restaurants, Movies, Shows, etc.	
Education/Childcare - School Fees, Uniforms, Sports Activities, Childcare, After School Care, Baby Sitting, Personal Further Education	

Personal Assets	\$
Cash in Bank	
Motor Vehicles	
Household Effects	
Superannuation	
Business Assets	
Home Value	Home Mortgage
Other Property Value	Other Property
Other Property Value	Other Property
<b>TOTAL ASSETS</b>	

Personal Liabilities	Lender	Balance	Limit	Repayment
Overdraft				
Credit Card				
Credit Card				
Vehicle Finance				
Vehicle Finance				
Lender	Rate	Principle?	Balance	Repayment

Would you be interested in having a home loan health check?

<b>TOTALS</b>	
<b>NET</b>	

Additional Notes	
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