

# Initial Customer Enquiry Form



## Appointment Date & Time:

Your general details										
	Applicant 1					Applicant 2				
Title	Mr	Mrs	Ms	Dr	Other	Mr	Mrs	Ms	Dr	Other
Full Name (including middle name)										
Home Phone										
Mobile Phone										
Email (preferred email for updates)										
Age of Dependant children										
How did you hear about us?										

What is it you're looking to do?										
Transaction Type	purchase    refinance    construction    debt consolidation    other other owner occupied (eg home improvements, personal use)									
Loan Purpose	owner-occupied    investment property    business    First Home Buyer    app1    app2									
Property Type	house    vacant land    unit/apartment    other									
Loan amount	\$									
If purchasing/building:	What is the contract price/build quote?					Amount of savings you have available:				
	\$					\$				
Preferred loan features	Variable Rate    Fixed Rate    Additional Payments    Redraw Offset Account    Internet Banking    Weekly Repayments    Fortnightly Repayments Interest Only (please provide a reason for this feature):									
When do you want to do this by?	ASAP    Pre-Approval    Finance due date:									

Employment details										
	Applicant 1					Applicant 2				
Income Gross	\$	A	M	F	W	\$	A	M	F	W
Or Income Net	\$	A	M	F	W	\$	A	M	F	W
Date started Employment										
Status	Full time	Part time	Casual	Contract		Full time	Part time	Casual	Contract	
On probation?	Yes	Time left:			No	Yes	Time left:			No
If self-employed	Sole trader	Partnership	Company			Sole trader	Partnership	Company		
Financials available	Yes	No				Yes	No			

Other Income details (if applicable) - Bonuses, Commission, Fringe Benefits, Centrelink etc (specify and estimate value)										
	Applicant 1					Applicant 2				
	\$	A	M	F	W	\$	A	M	F	W
	\$	A	M	F	W	\$	A	M	F	W
	\$	A	M	F	W	\$	A	M	F	W

## Liabilities / Debts

Personal Loans, Car Loans, HECS etc	Bank/Institution	Amount owing	Monthly repayment	Limit	Held by		Pay out / close?
		\$	\$	\$	App1	App2	
		\$	\$	\$			
		\$	\$	\$			
Credit Cards, zip pay, afterpay	Bank/Institution	Amount owing	Limit	Held by		Pay out / close?	
		\$	\$	App1	App2		
		\$	\$				
		\$	\$				
		\$	\$				
Approx monthly living expenses Eg Food, clothing, utilities, entertainment etc \$							

## Property Assets

Existing properties	Weekly Rental Income	Value	Lender	Amount owing	Monthly repayment	OO / Investment?		Pay out / close?	Held by	
						OO	I		App1	App2
Address 1										
	\$	\$		\$	\$					
Address 2										
	\$	\$		\$	\$					
Address 3										
	\$	\$		\$	\$					
Address 4										
	\$	\$		\$	\$					

## Other financial information

	App1		App2	
	Yes	No	Yes	No
Have you applied for credit in the past 12 months?				
Have you ever had financial judgments or legal proceedings against you?				
Did you have any difficulty meeting your financial commitments in the past 2 years?				
Are any of your existing debts currently in arrears?				
Are you concerned about rising interest rates?				
Do you expect any significant changes to your financial situation in the foreseeable future that would adversely impact your ability to meet your commitments?				
Please add comments if you answered "YES" to any of the questions				