



FACT FIND

A. PERSONAL DETAILS - APPLICANT 1

Borrower Guarantor Mr Mrs Ms

Surname

First Name Middle Name

Date of Birth (DOB) Driver Licence Number

Marital Status No. of Dependents & Their Ages

Mother's Maiden Name Citizenship

Nearest Relative **not** Living With You (Name & Relationship)

Nearest Relative Address & Phone Number

B. ADDRESS DETAILS - APPLICANT 1

Current Residential Address

Current Residential Address Status
 own mortgaged renting boarding other

Start Date at Current Address

Home or Work Phone Mobile

Email Address

Previous Residential Address (if less than 3 years at current)

Start Date at Previous Address

C. EMPLOYMENT DETAILS - APPLICANT 1

Current Employment

PAYG Self-employed Contract FT PT Casual

Occupation Employer Business Name

Employer Address (or Business Address if self-employed)

Employer Contact Person Employer Phone Number

Business ABN (if self-employed) Start Date of Current Employment

Previous Employment (if in current for less than 3 years)

PAYG Self-employed Contract FT PT Casual

Occupation Employer Business Name

Start Date of Previous Employment End Date of Previous Employment

A. PERSONAL DETAILS - APPLICANT 2

Borrower Guarantor Mr Mrs Ms

Surname

First Name Middle Name

Date of Birth (DOB) Driver Licence Number

Marital Status No. of Dependents & Their Ages

Mother's Maiden Name Citizenship

Nearest Relative **not** Living With You (Name & Relationship)

Nearest Relative Address & Phone Number

B. ADDRESS DETAILS - APPLICANT 2

Current Residential Address

Current Residential Address Status
 own mortgaged renting boarding other

Start Date at Current Address

Home or Work Phone Mobile

Email Address

Previous Residential Address (if less than 3 years at current)

Start Date at Previous Address

C. EMPLOYMENT DETAILS - APPLICANT 2

Current Employment

PAYG Self-employed Contract FT PT Casual

Occupation Employer Business Name

Employer Address (or Business Address if self-employed)

Employer Contact Person Employer Phone Number

Business ABN (if self-employed) Start Date of Current Employment

Previous Employment (if in current for less than 3 years)

PAYG Self-employed Contract FT PT Casual

Occupation Employer Business Name

Start Date of Previous Employment End Date of Previous Employment

D. GROSS MONTHLY INCOME – APPLICANT 1

Employment (pre-tax)	\$	<input type="text"/>	Investment/Shares	\$	<input type="text"/>
Total Rent Received	\$	<input type="text"/>	DSS/Other	\$	<input type="text"/>

D. GROSS MONTHLY INCOME – APPLICANT 2

Employment (pre-tax)	\$	<input type="text"/>	Investment/Shares	\$	<input type="text"/>
Total Rent Received	\$	<input type="text"/>	DSS/Other	\$	<input type="text"/>

E. MONTHLY EXPENSES – APPLICANT 1

Food/Basic Expenses	\$	<input type="text"/>	Transport	\$	<input type="text"/>
Telephone/Internet	\$	<input type="text"/>	Utilities	\$	<input type="text"/>
Health/Life Insurance	\$	<input type="text"/>	Other Insurance	\$	<input type="text"/>
Childcare/Education	\$	<input type="text"/>	Rent Paid	\$	<input type="text"/>

E. MONTHLY EXPENSES – APPLICANT 2

Food/Basic Expenses	\$	<input type="text"/>	Transport	\$	<input type="text"/>
Telephone/Internet	\$	<input type="text"/>	Utilities	\$	<input type="text"/>
Health/Life Insurance	\$	<input type="text"/>	Other Insurance	\$	<input type="text"/>
Childcare/Education	\$	<input type="text"/>	Rent Paid	\$	<input type="text"/>

F1. REALESTATE ASSETS – APPLICANT 1 & 2

Home	Address	Est. Value \$		Ownership
Investment 1	Address	Est. Value \$	Rent \$ pw	Ownership
Investment 2	Address	Est. Value \$	Rent \$ pw	Ownership
Investment 3	Address	Est. Value \$	Rent \$ pw	Ownership
Investment 4	Address	Est. Value \$	Rent \$ pw	Ownership

G1. HOMELOANS - APPLICANT 1 & 2

Home Loan Lender	Balance \$	Rate %	Repayment	Refinance
				<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment	Refinance
				<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment	Refinance
				<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment	Refinance
				<input type="checkbox"/>
Home Loan Lender	Balance \$	Rate %	Repayment	Refinance
				<input type="checkbox"/>

F2. OTHER ASSETS – APPLICANT 1 & 2

Vehicle 1	Make/Model/Year	Estimated Value \$	Ownership
Vehicle 2	Make/Model/Year	Estimated Value \$	Ownership
Boat/Caravan	Make/Model/Year	Estimated Value \$	Ownership
Motorbike	Make/Model/Year	Estimated Value \$	Ownership
Savings	Account/Details	Estimated Value \$	Ownership
Savings	Account/Details	Estimated Value \$	Ownership
Savings	Account/Details	Estimated Value \$	Ownership
Home Contents	Details	Estimated Value \$	Ownership
Shares	Details	Estimated Value \$	Ownership
Shares	Details	Estimated Value \$	Ownership
Superfund/SMSF	Details	Estimated Value \$	Ownership
Superfund/SMSF	Details	Estimated Value \$	Ownership

G2. OTHER LIABILITIES – APPLICANT 1 & 2

Vehicle Loan Lender	Repayment	Rate %	Balance \$	Refinance
				<input type="checkbox"/>
Vehicle Loan Lender	Repayment	Rate %	Balance \$	Refinance
				<input type="checkbox"/>
Vehicle Loan Lender	Repayment	Rate %	Balance \$	Refinance
				<input type="checkbox"/>
Vehicle Loan Lender	Repayment	Rate %	Balance \$	Refinance
				<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
				<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
				<input type="checkbox"/>
Credit Card Lender	Limit \$	Balance \$	Ownership	Refinance
				<input type="checkbox"/>
Personal Loan Lender	Repayment \$	Balance \$	Ownership	Refinance
				<input type="checkbox"/>
Personal Loan Lender	Repayment \$	Balance \$	Ownership	Refinance
				<input type="checkbox"/>
HECS/HELP Debt	Repayment \$	Balance \$	Ownership	
SMSFLoan Lender	Repayment \$	Rate	Balance \$	Refinance
				<input type="checkbox"/>
SMSFLoan Lender	Repayment \$	Rate	Balance \$	Refinance
				<input type="checkbox"/>

H. REQUIREMENTS & OBJECTIVES – APPLICANT 1 & 2

Please state primary reasons for seeking credit or the reasons for a review of an existing contract?

Purchase Funds To Complete (Broker to assist completing)

Security Property Value (\$)	
Expected Stamp Duty (\$)	
Conveyancer Fee (\$)	
Total Other Fees (\$)	
TOTAL COSTS (\$)	
Gifts and Grants (\$)	
Savings & Deposit Paid (\$)	
TOTAL LOAN REQUIRED (\$)	

Security Property Address/es

Valuation Contact Details

Proposed weekly rental income \$

How long will you retain the property (years)?

If refinancing or consolidating debts, please provide details of the debts being refinanced/consolidated and the resulting benefit to you.

I. DESIRED LOAN FEATURES

<p>Features ✓</p> <p>Variable Rate <input type="checkbox"/></p> <p>Fixed Rate <input type="checkbox"/></p> <p>Mixed: Fixed & Variable <input type="checkbox"/></p> <p>Multiple Account Splits <input type="checkbox"/></p>	<p>Features ✓</p> <p>Interest Only <input type="checkbox"/></p> <p>Offset Account <input type="checkbox"/></p> <p>Loan Variations <input type="checkbox"/></p> <p>Internet Banking <input type="checkbox"/></p>	<p>Features ✓</p> <p>Re-draw <input type="checkbox"/></p> <p>Line of Credit <input type="checkbox"/></p> <p>Additional Payments <input type="checkbox"/></p> <p>Portability <input type="checkbox"/></p>
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Desired Loan Splits	Preferred Lenders	Any Lenders you do not wish to deal with?
1 <input style="width: 200px; height: 20px;" type="text"/>	<input style="width: 200px; height: 20px;" type="text"/>	<input style="width: 200px; height: 20px;" type="text"/>
2 <input style="width: 200px; height: 20px;" type="text"/>	<input style="width: 200px; height: 20px;" type="text"/>	<input style="width: 200px; height: 20px;" type="text"/>
3 <input style="width: 200px; height: 20px;" type="text"/>	<input style="width: 200px; height: 20px;" type="text"/>	<input style="width: 200px; height: 20px;" type="text"/>

J. YOUR FINANCIAL SECURITY

	APPLICANT 1	APPLICANT 2
Have you ever had any financial judgments or legal proceedings against you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have any difficulty meeting your financial commitments in the past 2 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are any of your existing debts currently in arrears?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you concerned about rising interest rates? How concerned are you? If Yes , please provide details below.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you expect any significant changes to your financial situation in the foreseeable future that would ADVERSELY impact your ability to meet your commitments? How do you expect to meet your commitments?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Please comment below if you answered **Yes** to any questions or there any other factors that could affect your ability to repay loan?

Do you have any insurance to protect your lifestyle eg. life, total permanent disablement insurance, income protection, etc? Yes No Yes No

If No, how would your lifestyle needs be maintained if you and/or your partner were:

a) Temporarily unable to earn an income, for example through sickness/illness?

b) Permanently unable to earn income, for example through death/permanent disability?

Would you like someone to contact you regarding life insurance? Yes No Yes No

Do you have home and contents insurance? Yes No Yes No

Have you received advice from an accountant, solicitor or financial planner regarding your requirements or financial objectives? **If Yes**, please provide details: Yes No Yes No

K. OTHER FINANCIAL INFORMATION

Accountant Business Name	Accountant Name	Contact Number
<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Solicitor/Conveyancer Business Name	Solicitor/Conveyancer Name	Contact Number
<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>
Real Estate Agency	Agent Name	Contact Number
<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/>

I/we agree that my/our broker may keep the above parties updated about progress of my/our loan application.