

# COMMERCIAL APPLICATION FORM

---

## Main Applicant Details: (3 Year Minimum History For Residence & Employment)

Mr/Mrs/Miss/Ms: ..... Surname: ..... Given Names .....

Date of birth: .....

Home address: .....

Postcode: ..... Term: .....

Previous address (1): .....

Postcode: ..... Term: .....

Previous address (2): .....

Postcode: ..... Term: .....

Country of origin: ..... Permanent Australian Resident?  Yes  No

Marital status: ..... Number of dependants: ..... Age/s: .....

Home telephone number: ..... Mobile number: .....

Drivers licence number: ..... State of issue: ..... Expiry date: .....

### Employment details:

Current employer: .....

Occupation: ..... Term: .....

Contact name: ..... Contact phone number: .....

Previous employer (1): .....

Occupation: ..... Term: .....

Contact name: ..... Contact phone number: .....

Previous employer (2): .....

Occupation: ..... Term: .....

Contact name: ..... Contact phone number: .....

## OUR EASY 7 STEP PROCESS

1. Tell us a bit about what you need – we conduct a short interview to find out a bit more about how we can help you
2. Book an appointment to see an adviser – one of our professional staff will make a time to see you
3. We will make an assessment of your borrowing capacity and provide you with a funding table showing your borrowing position
4. We will source the best loan product for your situation and will provide you with the most competitive pricing in the market
5. You confirm with us you are happy to proceed and we submit your loan for processing
6. We keep you updated throughout the loan process
7. Your loan settles, but we don't stop there, we'll work with you to make sure your new loan set up is as hassle-free as possible

# COMMERCIAL APPLICATION FORM

---

## Joint Applicant Details: (3 Year Minimum History For Residence & Employment)

Mr/Mrs/Miss/Ms: ..... Surname: ..... Given Names .....

Date of birth: .....

Home address: ..... Postcode: ..... Term: .....

Previous address (1): ..... Postcode: ..... Term: .....

Previous address (2): ..... Postcode: ..... Term: .....

Country of origin: ..... Permanent Australia resident?  Yes  No

Marital status: ..... Number of dependants: ..... Age/s: .....

Home telephone number: ..... Mobile number: .....

Drivers licence number: ..... State of issue: ..... Expiry date: .....

## Employment Details:

Current employer: ..... Occupation: ..... Term: .....

Contact name: ..... Contact phone number: .....

Previous employer (1): ..... Occupation: ..... Term: .....

Contact name: ..... Contact phone number: .....

Previous employer (2): ..... Occupation: ..... Term: .....

Contact name: ..... Contact phone number: .....

## Company and trust borrower detail:

Company Name..... ABN No..... ACN.....

Company Directors (please list)

.....

Is Company Trustee for a Trust?  Yes  No Trust Name .....

Trustee (if not above company) .....

# COMMERCIAL APPLICATION FORM

### Loan details:

Loan purpose: (please tick)  Cash out  Purchase  Re-finance

Loan amount requires: (\$) ..... Loan product:  First mortgage  2nd mortgage/caveat

Loan term required: (please tick)  3 month  6 month  12 month  Other (please specify): .....

Repayment type: (please tick)  Interest paid monthly  Interest capitalised

### Security property details (1):

Property address: ..... Postcode: .....

Type (house, villa, townhouse, land only etc): ..... Estimated value: .....

Current mortgage balance: ..... Financier: .....

Title details (volume/folio): ..... Lot Number: .....

Plan of subdivision: ..... Rates notice provided:  Yes  No

Names on title: .....

### Security property details (2)

Property address: ..... Postcode: .....

Type (house, villa, townhouse, land only etc): ..... Estimated value: .....

Current mortgage balance: ..... Financier: .....

Title details (volume/folio): ..... Lot Number: .....

Plan of subdivision: ..... Rates notice provided:  Yes  No

Names on title: .....

### Security property details (3)

Property address: ..... Postcode: .....

Type (house, villa, townhouse, land only etc): ..... Estimated value: .....

Current mortgage balance: ..... Financier: .....

Title details (volume/folio): ..... Lot Number: .....

Plan of subdivision: ..... Rates notice provided:  Yes  No

Names on title: .....

### Brief summary of loan required (please include exit strategy):

.....

.....

.....

# COMMERCIAL APPLICATION FORM

**Financial details** (please tick):  Monthly/  Weekly OR  Fortnightly

Income details (Net only)	Main applicant	Joint applicant	Details/comments
Salary/Wages	\$	\$	
Frequency of pay	\$	\$	
Rental Income	\$	\$	
Social welfare benefit	\$	\$	
Other income	\$	\$	
<b>Total income</b>	\$	\$	

Expenditure details (Debts)	Paid to	Weekly payments	Balance owing	Credit limit/amount borrowed
1st mortgage/rent/bond		\$	\$	\$
2nd mortgage		\$	\$	\$
Personal loan		\$	\$	\$
Credit card (1)		\$	\$	\$
Credit card (2)		\$	\$	\$
Hire purchase		\$	\$	\$
Insurance (pay by the month etc)		\$	\$	\$
Other		\$	\$	\$
<b>Total weekly commitments</b>			\$	

Asset details		Liability Details	
Home (market value)	\$	Bank overdraft	\$
Other property (market value)	\$	Total mortgages	\$
Vehicles / boat	\$	Total hire purchases	\$
Bank accounts	\$	Credit card (1)	\$
Life insurance	\$	Credit Card (2)	\$
Furniture / effects	\$	Other debt / loans	\$
		Insurance	\$
<b>Total assets</b>	\$	<b>Total liability</b>	\$

I/We confirm that the information provided above is true and correct as at .....

Applicant Signature: .....

Joint Applicant Signature: ..... Broker Dealer Signature: .....