

## Loan Summary Information

Loan required \$  Lender

What do you require? (please tick one)

Eligibility check  New purchase  Refinance  Building  Top-up

Consultant  Company name

1. Loan in name of  1. Security in name of

2. Loan in name of  2. Security in name of

Settlement Date  Repayments:  Monthly  Fortnightly  Other

## Personal Details

### Applicant 1

Title  Dr / Mr / Mrs / Miss / Ms

Surname

Given name(s)

Preferred name

Date of birth  M F

No. of dependants  Ages

Street address

Suburb

City/Town

Postcode  Years at this address

Previous address

For  years

Email

Ph (Hm)  Ph (Wk)

Fax  Mobile

Postal address (if different from above)

### Applicant 2

Title  Dr / Mr / Mrs / Miss / Ms

Surname

Given name(s)

Preferred name

Date of birth  M F

No. of dependants  Ages

Street address

Suburb

City/Town

Postcode  Years at this address

Previous address

For  years

Email

Ph (Hm)  Ph (Wk)

Fax  Mobile

Postal address (if different from above)

## Current Employment

Employer

Your role/title

Years with this employer  years  months

Usual hours worked per week  hours

IRD number  -  -

Employer

Your role/title

Years with this employer  years  months

Usual hours worked per week  hours

IRD number  -  -

## Previous Employment

Employer

Your role/title

Years with this employer  years  months

Employer

Your role/title

Years with this employer  years  months



# Income and Expenditure

## ANNUAL GROSS INCOME

	Applicant 1	Applicant 2
Wages/salary	\$	\$
S/E earned Income	\$	\$
Rental Income	\$	\$
Other (Boarder ETC)	\$	\$
<b>Total per annum</b>	\$	\$
		= \$

## MONTHLY EXPENDITURE

(AFTER LOAN SETTLEMENT)

Loan amount	Table I/O RCF	% p.a.	Term	Fixed	Repayment amount
\$					\$
\$					\$
\$					\$
\$					\$

## MONTHLY NET INCOME

Applicant 1	\$
Applicant 2	\$
Rental Income 1 @.....%	\$
Rental Income 2 @.....%	\$
Rental Income 3 @.....%	\$
Rental Income 4 @.....%	\$
Rental Income 5 @.....%	\$
Other Income Applicant 1	\$
Other Income Applicant 2	\$
<b>TOTAL MONTHLY INCOME (C)</b>	\$
<b>TOTAL MONTHLY EXPENDITURE (D)</b>	\$
<b>MONTHLY SURPLUS (C - D)</b>	\$

## SUB TOTAL (Loan Repayments)

	\$
Other Loan Repayment(s)	\$
Credit Cards – Total Limits \$.....	\$
Store Cards – Total Limits \$..... Issuer .....	\$
Overdraft – Limit \$.....	\$
Hire Purchase Balance \$ .....Lender .....	\$
Balance \$ .....Lender .....	\$
Household Expenses (Power, Gas, Internet, Phones)	\$
Student Loan – Balance \$.....	\$
Child Maintenance / Day Care	\$
Insurance Premiums (Life, Trauma, Income)	\$
Medical Insurance Premiums	\$
Vehicle Expenses (Running, Insurance, Rego Maintenance)	\$
Rent/Bodycorp to pay each week \$	\$
Superannuation/Kiwi Saver	\$
Dwelling Rates / Section Lease (Including Water)	\$
Living Expenses (Food, Clothing, General)	\$
House/Content Insurance	\$
Other Expenses (Subscriptions, Doctors, Gifts, Dwelling Repairs & Maintenance etc.)	\$
<b>TOTAL MONTHLY EXPENDITURE (D)</b>	\$

## OFFICE USE ONLY

<b>LVR</b>	<b>DSR</b>	<b>Surplus</b>

Settlement Date

Repayments:

Monthly

Fortnightly

Other

# Checklist

Document	Attached	Forthcoming	Comment
Signed Application Form	<input type="checkbox"/>	<input type="checkbox"/>	-----
Diary Note	<input type="checkbox"/>	<input type="checkbox"/>	-----
Identification	<input type="checkbox"/>	<input type="checkbox"/>	-----
Proof of Residency	<input type="checkbox"/>	<input type="checkbox"/>	-----
Credit Checks	<input type="checkbox"/>	<input type="checkbox"/>	-----
Proof of Income	<input type="checkbox"/>	<input type="checkbox"/>	-----
Sale and Purchase Agreement	<input type="checkbox"/>	<input type="checkbox"/>	-----
Valuation(s)	<input type="checkbox"/>	<input type="checkbox"/>	-----
Proof of Deposit	<input type="checkbox"/>	<input type="checkbox"/>	-----
3 Months Bank Statements	<input type="checkbox"/>	<input type="checkbox"/>	-----
6 Months Mortgage Statements	<input type="checkbox"/>	<input type="checkbox"/>	-----
Building Contract	<input type="checkbox"/>	<input type="checkbox"/>	-----
Gift / Statutory Declaration	<input type="checkbox"/>	<input type="checkbox"/>	-----
Certificate of Incorporation	<input type="checkbox"/>	<input type="checkbox"/>	-----
Trust Deed	<input type="checkbox"/>	<input type="checkbox"/>	-----
Other	<input type="checkbox"/>	<input type="checkbox"/>	-----

# Special Requests

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## SECURITY DETAILS (and rental income if applicable)

Address	Type *	Est. Market	G.V.	R/V (net)	Rent (p/week)
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<b>TOTAL SECURITY</b>		\$ <input style="border: 2px solid black;" type="text"/>			

\*Type = Home / Rental / Holiday / Farm / Land / Lifestyle / Apartment. If an Apartment, what is the floor size - ..... m<sup>2</sup>