

	e				
Given Na	ames			Date of	Birth
Status			Fem	ale 🔲	Male 🗌
Work Ph	ione				
Home P	hone				
Mobile N	Number				
E-mail					
Age of	dependan	t chi <b>l</b> dren			
Current	<b>t</b> Address				
Suburb				State	
Post Coo	le Dat	te moved	l in	Reside	ntial Statu
Previou	∟ u <b>s</b> Addres:				
Suburb				State	
Post Cod	e Date	e moved i	— in F	∟ Resident	ial Status
	Employm	<u>ient</u>			
Occupati	on				
L Emp <b>l</b> oye	r		Dat	e Starte	 ed
Employr	nent Statu	ıs			
Gross in	come				
Gross bo	nuses				
Gross ov	ertime				
	ı <b>s</b> Employı	ment			
<u>Previou</u>	on				
	UII				
Previou Occupati Employe					

Sivon Namos	Data of Birth
Given Names	Date of Birth
Status	Female Male
Work Phone	
Home Phone	
Mobile Number	
E-mail	
Age of dependant child	Iren
Current Address	
Suburb	State
Post Code Date mo	ved in Residential Status
Duantana Addisas	
Previous Address	
	GL L
Suburb	State
Post Code Date mov	ed in Residential Status
Current Employment	
Occupation	
Employer	Date Started
- 1	
Employment Status	
Gross income	
Gross bonuses	
Gross overtime	
Previous Employment	
Occupation	
Employer	
Employment Status	
Employment Status  Date Started	

## **Assets and Liabilities**



Assets (what you own) Please print extra pages for additional properties etc

Asset Type	Description	Total Value	Monthly income	Percentage Owned		Туре		
Total Residentia	I Properties	'	·	App1	App2	Joint	0/0	Inv
Property 1								
Property 2								
Property 3								
Total shares/ma	naged funds	·						
Investment 1								
Investment 2								
Total savings/tr	ansaction accounts		<u> </u>	•	•	•	•	•
Account 1								
Account 2								
Total Superannı	uation Funds	·		•				
Fund 1								
Fund 2						Ĭ		
Motor Vehicles a	and Other Assets (provide year,	make and model)						
Motor Vehicle 1								
Motor Vehicle 2								
Other Asset 1								
Other Asset 2								

## **Liabilities** (what you owe)

Liability Type	Lender	Interest Rate	Limit	Monthly Payments	Balance	Percentage Owned				
Mortgage Loans	,					App 1	App 2	Joint	To cease	
Property 1										
Property 2										
Property 3										
Credit Card/store	cards						•			
Card 1										
Card 2										
Card 3										
Card 4										
Personal/Car Loai	ns			•				•		
Loan 1										
Loan 2										
Loan 3										
Line of credit/Ove	erdrafts				-					
Account 1										
Account 2										
Other Fixed Liabil	ities (Leasing, Ta	xation, HECS, C	hild Mainter	nance etc)						
Current Rent										
Other 1										
Other 2										



Applicant 1

What is the purpose of the credit?
How long do you expect to remain in the credit contract?
What is your budgeted monthly payment for the loan?
Extra pay- Don't care Nice to have Must have Phone banking Don't care Nice to have Must have
Loan redraw Don't care Nice to have Must have Branch Access Don't care Nice to have Must have
Offset Account Don't care Nice to have Must have Multiple Splits Don't care Must have
Portability Don't care Nice to have Must have Cheque book Don't care Nice to have Must have
Internet access Don't care Nice to have Must have Switch products Don't care Nice to have Must have
Is there a product type that interests you?
What is your preferred loan repayment type?  Principal and interest Interest Only Unsure
Do you have a preferred lender type?   Major Bank Mortgage Manager Regional Bank Building Society Unsure
Are there any lenders you don't want to deal with?
How would you rate your current job security? (the higher the number, the more secure you feel)
Are you concerned about rising interest rates? (the higher the number, the higher your concern)
Are all your current credit commitments up to date?
If NO—please provide details including how you intend to bring payments back in line
Have you had any judgements, defaults or legal proceedings against you?
If YES—please provide detailed information
Do you anticipate that your INCOME will decrease in the next 6-12 months?
If YES—please provide detailed information
Do you anticipate that your EXPENSES will increase in the next 6-12 months? Yes No
If YES—please provide detailed information
Insurance
Do you have adequate Home and Contents Insurance as well as Insurance to meet your loan repayments should you not be able to work i.e mortgage protection or income protection
If you answered NO, would you like one of our associates to contact you regarding insurance? Yes No
I/we authorise iShare Cashback Mortgage Brokers to use the information to determine a suitable lender and loan product. I/we confirm that all information gathered in this questionnaire is confidential and subject to the Privacy Act. Essentially, any personally identifiable information provided by me/us will not be released to anyone outside iShare Cashback Mortgage Brokers without my/our prior written consent.
I/we confirm the information in this questionnaire is true and correct to the best of my/our knowledge as per the date signed.

Date

Applicant 2

Date