



Responsible Lending Questionnaire

Applicant 1

Surname

Given Names

Date of Birth

Status

Female

Male

Work Phone

Home Phone

Mobile Number

E-mail

Age of dependant children

Current Address

Suburb

State

Post Code

Date moved in

Residential Status

Previous Address

Suburb

State

Post Code

Date moved in

Residential Status

Current Employment

Occupation

Employer

Date Started

Employment Status

Gross income

Gross bonuses

Gross overtime

Previous Employment

Occupation

Employer

Employment Status

Date Started

Date Finished

Applicant 2

Surname

Given Names

Date of Birth

Status

Female

Male

Work Phone

Home Phone

Mobile Number

E-mail

Age of dependant children

Current Address

Suburb

State

Post Code

Date moved in

Residential Status

Previous Address

Suburb

State

Post Code

Date moved in

Residential Status

Current Employment

Occupation

Employer

Date Started

Employment Status

Gross income

Gross bonuses

Gross overtime

Previous Employment

Occupation

Employer

Employment Status

Date Started

Date Finished



Loan and Features

What is the purpose of the credit?

How long do you expect to remain in the credit contract? Over 10 years 5 to 10 years Less than 5 years

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 Nice to have 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? Packaged loan Line of Credit Fixed Rate Basic Variable Unsure

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)

1 2 3 4 5 6 7 8 9 10

Are you concerned about rising interest rates? (the higher the number, the higher your concern)

1 2 3 4 5 6 7 8 9 10

Are all your current credit commitments up to date? Yes No

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? Yes No

If YES—please provide detailed information

Do you anticipate that your INCOME will decrease in the next 6-12 months? Yes No

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 Yes No

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.

Applicant 1

Date

Applicant 2

Date