

Loan Enquiry Form

Contact Details

Enquiry Date:	/ /	Referrer Details:	_____
Name(s):	Applicant 1: _____	Applicant 2: _____	
Contact numbers:	D.O.B. _____	D.O.B. _____	
	Home: _____	Current Address	
	Work: _____		
	Mobile _____	Previous Address (if less than 3 years)	
	Email _____		
Number of Dependants	_____	Age of Dependants	_____

Loan Requirements

Loan Purpose:		
<input type="checkbox"/> Pre-approval	<input type="checkbox"/> Purchase house / unit	<input type="checkbox"/> Refinance
<input type="checkbox"/> Purchase and refinance	<input type="checkbox"/> Bridging	<input type="checkbox"/> Construction / building
<input type="checkbox"/> Debt consolidation	<input type="checkbox"/> Land	<input type="checkbox"/> Other
Purchase Type	<input type="checkbox"/> Owner occupied	<input type="checkbox"/> Investment

What is important to you in a home loan?

Loan needed \$	Total property value \$
	\$

Customer contribution	\$	<input type="checkbox"/> Saved	<input type="checkbox"/> Gift	<input type="checkbox"/> Other
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Property 1.	\$	Address 1.
Property 2.	\$	Address 2.

<input type="checkbox"/> Purchase / Building Contract Signed	Settlement Date:
<input type="checkbox"/> Seeing other lenders	Who?
<input type="checkbox"/> Ready to lodge an application	<input type="checkbox"/> First Home Buyer

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Income and Expenses

Income applicant 1.	Income applicant 2.
Employer	Employer
Years there Previous	Years there Previous
\$ (self employed / salaried)	\$ (self employed / salaried)
Rental/Other Income: \$	Rental/Other Income: \$

Liabilities:	Lender & Type	Owing	Limit
Credit Card 1:			
Credit Card 2:			
Credit Card 3:			
Store Cards:			
	Lender	Balance	Monthly repayment
Personal Loan:			
Motor Vehicle Loan:			

Assets:	Description	Insured With	Value
Real Estate:			
Home Contents:			
Life Insurance:			
Superannuation:			
Motor Vehicle 1:			
Motor Vehicle 2:			
Other Assets:			

ANY OTHER INFORMATION YOU WOULD LIKE TO ADD?
