



Initial Loan enquiry form

Borrowers name and contact details	Borrower 1	Borrower 2	
Full name			
Marital status			
Address			
Phone: home			
Work			
Mobile			
Fax			
Email			
Date of birth			
Dependants < 18 yrs			
Drivers licence number			
Loan requirements			
	Loan 1	Loan 2	
Loan amount			
Purpose			
Personal			
Business / Investment			
Purchase of property			
Refinance, consolidate debts / credit card			
Renovations to own home			
Equipment			
Vehicle purchase			
Other			
	Borrower 1	Borrower 2	
Employment status & Income from job / business			
Occupation			
PAYG / self employed			
Employer (if on salary)			
Full / part-time / casual			
How long in this job?			
Gross salary / income p.a.			
Other salary income?			
If so, how much p.a.?			
Rental property			
Address			
Rental income p.a.			
Other income			
Total income p.a.			

Credit History	Borrower 1		Borrower 2
Date of default			
Amount still owing			
Lender			
Resolved			
Undischarged bankruptcy			
Other			
Current liabilities			
Rental expense per month			
How long lived there?			Assets
How long at prior place?			Own house:
Existing loan on own house			Address
Type of loan			Purchase price
Amount owing			Date of purchase
Lender			Current value
Current interest rate			Investment property
Repayment per month			Address
Credit cards			Purchase price
Amount owing (on all cards)			Date of purchase
Credit card limit (total)			Current value
Store cards			Shares & Debentures (current value)
Amount owing (on all cards)			Savings at bank
Credit card limit (total)			Vehicles – current value
			Other
Expenses			
School fees p.a.			
Food & Living expenses			
Utilities			
What are you wanting to finance?			
Item / address			
Total Purchase price			
If property – date of settlement?			