



LOAN APPLICATION

Loan Purpose	<input type="checkbox"/> home loan	<input type="checkbox"/> investment loan	<input type="checkbox"/> top up	<input type="checkbox"/> refinance
Loan Term	<input type="checkbox"/> 20 years	<input type="checkbox"/> 25 Years	<input type="checkbox"/> 30 Years	other: _____ years
Approval Type	<input type="checkbox"/> pre-approval	<input type="checkbox"/> full approval	Present customer of _____	

CUSTOMER DETAILS	first applicant					second applicant				
Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/>	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/>
First Name(s)										
Family Name										
Date & Country of Birth			Country					Country		
Phones	h _____		w _____			h _____		w _____		
Cell Phone										
Email										
Gender	<input type="checkbox"/> male		<input type="checkbox"/> female			<input type="checkbox"/> male		<input type="checkbox"/> female		
Marital Status	<input type="checkbox"/> divorced	<input type="checkbox"/> defacto	<input type="checkbox"/> single			<input type="checkbox"/> divorced	<input type="checkbox"/> defacto	<input type="checkbox"/> single		
	<input type="checkbox"/> separated	<input type="checkbox"/> widowed	<input type="checkbox"/> married			<input type="checkbox"/> separated	<input type="checkbox"/> widowed	<input type="checkbox"/> married		
Ages of Dependents										
Residency Status	<input type="checkbox"/> NZ Resident	<input type="checkbox"/> Non Res	<input type="checkbox"/> Work Permit			<input type="checkbox"/> NZ Resident	<input type="checkbox"/> Non Res	<input type="checkbox"/> Work Permit		
Street										
Suburb										
City										
How Long at this Address?	years / _____		/months			years / _____		/months		
Previous Address										
Suburb										
City										
How Long at this Address?	years / _____		/months			years / _____		/months		
Residential Status	<input type="checkbox"/> own home	<input type="checkbox"/> renting	<input type="checkbox"/> board			<input type="checkbox"/> own home	<input type="checkbox"/> renting	<input type="checkbox"/> board		
	<input type="checkbox"/> parents	<input type="checkbox"/> flatting	<input type="checkbox"/> other			<input type="checkbox"/> parents	<input type="checkbox"/> flatting	<input type="checkbox"/> other		
Status	<input type="checkbox"/> full time	<input type="checkbox"/> casual	<input type="checkbox"/> part time			<input type="checkbox"/> full time	<input type="checkbox"/> casual	<input type="checkbox"/> part time		
	<input type="checkbox"/> home maker	<input type="checkbox"/> contract	<input type="checkbox"/> retired			<input type="checkbox"/> home maker	<input type="checkbox"/> contract	<input type="checkbox"/> retired		
Are you Self Employed?	<input type="checkbox"/> Yes		<input type="checkbox"/> No			<input type="checkbox"/> Yes		<input type="checkbox"/> No		
Occupation										
Employers Name										
Time Employed There y/m	years		months			years		months		
Previous Employer (if <3y)										
Time Employed There y/m	years / _____		/months			years / _____		/months		

initials

LOAN DETAILS

Loan Amount		Deposit	
Finance Date		Settlement Date	
New Property Address			
Status	<input type="checkbox"/> owner/occupied	<input type="checkbox"/> tenanted	<input type="checkbox"/> Y <input type="checkbox"/> N address change at draw down?
Solicitor			

<u>ASSETS (combined)</u>	Value	<u>LIABILITIES(combined)</u>	Limit	Owing
Cash in Bank	\$	Overdraft/facility	\$	\$
Cash in Bank	\$	Home loan 1		\$
Cash in Bank	\$	Home loan 2		\$
Family Home	\$	Home loan 3		\$
Investment 1	\$	Home loan 4		\$
Investment 2	\$	Personal loan		\$
Investment 3	\$	Hire purchase 1		\$
Investment 4	\$	Hire purchase 2		\$
Vehicles	# <input type="text"/> value \$	Hire purchase 3		\$
Superannuation/life insurance (surrender value only)	\$	Credit card	\$	\$
Shares/bond/investments	\$	Credit card	\$	\$
Household effects	\$	Store card	\$	\$
Deposit paid on property purchase	\$	Student loan		\$
Other assets	\$	Other liabilities		\$
	\$			\$
	\$			\$
	\$			\$

INCOME

first applicant

second applicant

	net	gross	wk	fnt	mth	yr	amount	net	gross	wk	fnt	mth	yr	amount
Salary/wages							\$							\$
Boarder (current)							\$							\$
Boarder (proposed)														
Working for Families							\$							\$
Govt benefits/pension							\$							\$
Business							\$							\$
Other							\$							\$
Rent received							\$							\$
Proposed rent							\$							\$



* will NOT apply after this loan

initials _____

MONTHLY EXPENSES

Overdraft/facility	\$	Other	\$
Home loan 1	\$		\$
Home loan 2	\$		\$
Home loan 3	\$		\$
Home loan 4	\$		\$
Personal loan	\$		\$
Hire purchase 1	\$		
Hire purchase 2	\$		
Hire purchase 3	\$		
Credit card	\$		
Credit card	\$		
Store card	\$		
Student loan	\$		
Other liabilities	\$		
Food & clothing	\$		
Power/gas	\$		
Telephone/internet	\$		
House insurance	\$		
Contents insurance	\$		
Rates	\$		
Life insurance	\$		
Medical insurance	\$		
Super/Kiwisaver	\$		

LOAN STRUCTURE

	payments		type		interest options		term	rate	amount
	fn	mn	p&i	i/o	var	fxd			
Loan 1								\$	
Loan 2								\$	
Loan 3								\$	
Loan 4								\$	
Revolving facility								\$	
Security in the name of	_____							Personal Names	<input type="text"/>
Loan in the name of	_____							Personal Names	<input type="text"/>



Are you guaranteeing a loan for anyone else?

Y	N
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Details:

Amount:\$ _____

initials _____