

Personal Details for Finance Application

The following details are required to assess borrowing capacity and loan eligibility. Please complete all areas of the application as thoroughly as possible.

Please contact Quay Finance at any time if you have any questions, or we can assist in any way.

This is not an application for finance, but simply a data collection form. A Privacy Act for the specific lender you require will need to be signed by you, therefore gaining your consent, before an application can be submitted to a lender.

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Quay Finance Pty Ltd is a member of the Lifespan Financial Planning Group

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Page 1 of 5

PERSONAL DETAILS

APPLICANT 1

Title First name Middle name(s)

Surname

Date of birth / / Driver licence details
 Number State of issue

Marital status
 Married Single Separated
 Divorced Defacto Widowed

Age(s) of your dependants
Dependants include a spouse/defacto (who is not Applicant 2) and children. Note: If you are applying for a joint loan and have shared dependents, only one applicant needs to list them.

Maiden name (if applicable)

Work phone number Home phone number

Mobile phone number Fax number

Email address

Current residential status
 Owner with mortgage Owner no mortgage Renting
 Supplied by employer Living with relatives Boarding

Current residential address

 Postcode
 Time at current access Years Months

Postal address, complete only if different to residential address

 Postcode

Are you a permanent resident?
 No Yes

Previous residential address, if less than 3 years at your current address

 Postcode
 Time at current access Years Months

Will your address change upon drawdown of your loan?
 No Yes – please specify your new address

 Postcode

APPLICANT 2

Title First name Middle name(s)

Surname

Date of birth / / Driver licence details
 Number State of issue

Marital status
 Married Single Separated
 Divorced Defacto Widowed

Age(s) of your dependants
Dependants include a spouse/defacto (who is not Applicant 2) and children. Note: If you are applying for a joint loan and have shared dependents, only one applicant needs to list them.

Maiden name (if applicable)

Work phone number Home phone number

Mobile phone number Fax number

Email address

Current residential status
 Owner with mortgage Owner no mortgage Renting
 Supplied by employer Living with relatives Boarding

Current residential address

 Postcode
 Time at current access Years Months

Postal address, complete only if different to residential address

 Postcode

Are you a permanent resident?
 No Yes

Previous residential address, if less than 3 years at your current address

 Postcode
 Time at current access Years Months

Will your address change upon drawdown of your loan?
 No Yes – please specify your new address

 Postcode

REFERENCE

Have you ever had or are there now any judgments, attachments or legal proceedings against you?

No Yes – Please obtain a signed copy of the default letter by solicitor and borrower and provide a brief written explanation of the default

Details of nearest relative not living with you

Name	Relationship	Phone number
<input type="text"/>	<input type="text"/>	(<input type="text"/>) <input type="text"/>
Address		
<input type="text"/>		State <input type="text"/> Postcode <input type="text"/>

EMPLOYMENT DETAILS

APPLICANT 1

Current employment status

Full time Part time Self employed
 Other – specify

Name of your current employer OR business if self-employed

Current employer's address

Postcode

Date employment started Occupation

/ /

Type of industry

Previous employer's name, if less than 3 years with current employer

Name of your current employer OR business if self-employed

Length of service

Years Months

Previous employment status

Full time Part time Self employed
 Other – specify

APPLICANT 1

Current employment status

Full time Part time Self employed
 Other – specify

Name of your current employer OR business if self-employed

Current employer's address

Postcode

Date employment started Occupation

/ /

Type of industry

Previous employer's name, if less than 3 years with current employer

Name of your current employer OR business if self-employed

Length of service

Years Months

Previous employment status

Full time Part time Self employed
 Other – specify

MONTHLY INCOME

APPLICANT 2

		Gross Monthly Income	Net Monthly Income
Gross salary		\$	\$
Overtime		\$	\$
Commission/Bonus		\$	\$
Rental income	Existing	\$	\$
	Proposed	\$	\$
Dividend/Interest income		\$	\$
Motor vehicle allowance		\$	\$
Othe income		\$	\$

APPLICANT 2

		Gross Monthly Income	Net Monthly Income
Gross salary		\$	\$
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Commission/Bonus		\$	\$
Rental income	Existing	\$	\$
	Proposed	\$	\$
Dividend/Interest income		\$	\$
Motor vehicle allowance		\$	\$
Othe income		\$	\$

ASSETS AND LIABILITIES

ASSETS (What you own)

Asset Details				Value/Balance	Applicant 1/2/Joint
Home	Address			\$	
Other Property or Land	Address	1.		\$	
	Address	2.		\$	
	Address	3.		\$	
	Address	4.		\$	
Bank Accounts	Organisation	1.	Account no.	\$	
	Organisation	2.	Account no.	\$	
	Organisation	3.	Account no.	\$	
Motor Vehicles	Make and model	1.	Year made	\$	
	Make and model	2.	Year made	\$	
All Other Assets (<i>Do not include goodwill, home contents, superannuation</i>)	Description	1.		\$	
	Description	2.		\$	
	Description	3.		\$	
Total value of what you own				\$	
Sundry Assets	Superannuation (Estimate current payout)			\$	
	Goodwill of Business (Estimated value)			\$	
	Home contents (insured value)			\$	

LIABILITIES/EXPENSES (What you currently owe)

Type of liability	Name of lender	Type of loan	Current limit/Original loan amount	Amount owing	Monthly expenses		Applicant 1/2/Joint	To be paid out
					pre loan	post loan		
Home and other property loans	1.		\$	\$	\$	\$		<input type="checkbox"/>
	2.		\$	\$	\$	\$		<input type="checkbox"/>
	3.		\$	\$	\$	\$		<input type="checkbox"/>
	4.		\$	\$	\$	\$		<input type="checkbox"/>
	5.		\$	\$	\$	\$		<input type="checkbox"/>
	6.		\$	\$	\$	\$		<input type="checkbox"/>
Other loans, overdrafts, loans with redraw, lease, hire purchase	1.		\$	\$	\$	\$		<input type="checkbox"/>
	2.		\$	\$	\$	\$		<input type="checkbox"/>
	3.		\$	\$	\$	\$		<input type="checkbox"/>
Personal Consumer Loans	1.		\$	\$	\$	\$		<input type="checkbox"/>
	2.		\$	\$	\$	\$		<input type="checkbox"/>
Other liabilities (<i>include loans you are guarantor for</i>)	1.		\$	\$	\$	\$		<input type="checkbox"/>
	2.		\$	\$	\$	\$		<input type="checkbox"/>
Credit cards and store cards (<i>include even if balance is nil</i>)	1.		\$	\$	\$	\$		<input type="checkbox"/>
	2.		\$	\$	\$	\$		<input type="checkbox"/>
	3.		\$	\$	\$	\$		<input type="checkbox"/>
	4.		\$	\$	\$	\$		<input type="checkbox"/>
	5.		\$	\$	\$	\$		<input type="checkbox"/>

OTHER MONTHLY EXPENSES

	Pre loan	Post loan		
Fixed expenses (<i>e.g. rent, etc</i>)	\$	\$		
Other expenses (<i>e.g. general living costs, etc</i>)	\$	\$		

Solicitors & Insurance Information