

# Mortgage Enquiry Form

## Personal Details – Applicant 1

First Name:  Middle Name:  Surname:

Preferred Name:  Date of birth:  Marital Status:

Address:

Date moved in:  Occupancy Type:  Weekly rent (if renting)

Previous address

*(If current address is less than 3 years)*

Date moved in:  Date moved out:  Occupancy Type:

Email:  Mobile:  Home phone:

Dependents ages:     Mother's Maiden Name:

Nearest friend or relative name:  Nearest friend/relative phone no:

## Employment Details – Applicant 1

Employer name:  Occupation:  Basis:

Start date:  Contact person:  Work phone no:

Employer Address:

*If current employment is for less than 3 years, please provide details of previous employment:*

Employer name:  Occupation:  Basis:

Start date:  Contact person:  Work phone no:

Employer Address:

## Personal Details – Applicant 2

First Name:  Middle Name:  Surname:

Preferred Name:  Date of birth:  Marital Status:

Address:

Date moved in:  Occupancy Type:  Weekly rent (if renting)

Previous address

*(If current address is less than 3 years)*

Date moved in:  Date moved out:  Occupancy Type:

Email:  Mobile:  Home phone:

Dependents ages:     Mother's Maiden Name:

Nearest friend or relative name:  Nearest friend/relative phone no:

## Employment Details – Applicant 2

Employer name:  Occupation:  Basis:

Start date:  Contact person:  Work phone no:

Employer Address:

*If current employment is for less than 3 years, please provide details of previous employment:*

Employer name:  Occupation:  Basis:

Start date:  Contact person:  Work phone no:

Employer Address:

Income Details					
Applicant 1			Applicant 2		
	Gross Amount	Frequency:		Gross Amount	Frequency:
Salary:			Salary:		
Bonus:			Bonus:		
Allowance:			Allowance:		
Commissions:			Commissions:		
Overtime:			Overtime:		
Rental:			Rental:		
Dividend:			Dividend:		
Interest:			Interest:		
Pension:			Pension:		
Centrelink:			Centrelink:		
Child support:			Child support:		
Other:			Other:		
-			-		
-			-		

Monthly Living Expenses			
Utilities & Rates - Owner Occupied Property:	\$	Transport:	\$
Utilities & Rates - Investment Property:	\$	Education:	\$
Telephone & Internet:	\$	Childcare:	\$
Pay TV & Streaming Services:	\$	Insurance:	\$
Groceries:	\$	Rent:	\$
Recreation & Entertainment:	\$	Other:	\$
Clothing & Personal Care:	\$	Other:	\$
Medical & Health (Exc. Health Insurance):	\$	<b>Total:</b>	<b>\$</b>

Owner Occupied Property Details – Current Home			
Address:	<input style="width: 100%;" type="text"/>		
Date purchased:	<input style="width: 15%;" type="text"/>	Current value:	<input style="width: 15%;" type="text"/>
Owner:	<input style="width: 15%;" type="text"/>	Lender:	<input style="width: 15%;" type="text"/>
Interest rate:	<input style="width: 15%;" type="text"/>	Monthly repayment:	<input style="width: 15%;" type="text"/>
	Insurance company:	<input style="width: 15%;" type="text"/>	Loan balance:
		<input style="width: 15%;" type="text"/>	<input style="width: 15%;" type="text"/>
		Insured value	<input style="width: 15%;" type="text"/>

Investment Property Details - 1			
Address:	<input style="width: 100%;" type="text"/>		
Date purchased:	<input style="width: 15%;" type="text"/>	Rental Income:	<input style="width: 15%;" type="text"/>
Owner:	<input style="width: 15%;" type="text"/>	Lender:	<input style="width: 15%;" type="text"/>
Interest rate:	<input style="width: 15%;" type="text"/>	Monthly repayment:	<input style="width: 15%;" type="text"/>
	Insurance company:	<input style="width: 15%;" type="text"/>	Loan balance:
		<input style="width: 15%;" type="text"/>	<input style="width: 15%;" type="text"/>
		Insured value:	<input style="width: 15%;" type="text"/>

Investment Property Details - 2			
Address:	<input style="width: 100%;" type="text"/>		
Date purchased:	<input style="width: 15%;" type="text"/>	Rental Income:	<input style="width: 15%;" type="text"/>
Owner:	<input style="width: 15%;" type="text"/>	Lender:	<input style="width: 15%;" type="text"/>
Interest rate:	<input style="width: 15%;" type="text"/>	Monthly repayment:	<input style="width: 15%;" type="text"/>
	Insurance company:	<input style="width: 15%;" type="text"/>	Loan balance:
		<input style="width: 15%;" type="text"/>	<input style="width: 15%;" type="text"/>
		Insured value:	<input style="width: 15%;" type="text"/>

**Credit/Store Card Details**

Holder:	<input type="text"/>	Lender:	<input type="text"/>	Card Type:	<input type="text"/>
Limit:	<input type="text"/>	Balance:	<input type="text"/>	Interest rate:	<input type="text"/>
Holder:	<input type="text"/>	Lender:	<input type="text"/>	Card Type:	<input type="text"/>
Limit:	<input type="text"/>	Balance:	<input type="text"/>	Interest rate:	<input type="text"/>
Holder:	<input type="text"/>	Lender:	<input type="text"/>	Card Type:	<input type="text"/>
Limit:	<input type="text"/>	Balance:	<input type="text"/>	Interest rate:	<input type="text"/>

**Other Loans (Personal, Line of Credits, Overdraft etc)**

Holder:	<input type="text"/>	Lender:	<input type="text"/>	Loan Type:	<input type="text"/>
Limit:	<input type="text"/>	Balance:	<input type="text"/>	Interest rate:	<input type="text"/>
Holder:	<input type="text"/>	Lender:	<input type="text"/>	Loan Type:	<input type="text"/>
Limit:	<input type="text"/>	Balance:	<input type="text"/>	Interest rate:	<input type="text"/>
Holder:	<input type="text"/>	Lender:	<input type="text"/>	Loan Type:	<input type="text"/>
Limit:	<input type="text"/>	Balance:	<input type="text"/>	Interest rate:	<input type="text"/>

**Life Insurance**

Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Insurance Company:	<input type="text"/>
Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Insurance Company:	<input type="text"/>

**Superannuation**

Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Superannuation Fund:	<input type="text"/>
Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Superannuation Fund:	<input type="text"/>

**Motor Vehicles Details**

Vehicle Details:	<i>Make:</i>	<i>Model:</i>	<i>Year:</i>	<i>Manual/Auto</i>	
Owner:	<input type="text"/>	Current value:	<input type="text"/>	Loan balance:	<input type="text"/>
Lender:	<input type="text"/>	Monthly repayment:	<input type="text"/>	Interest rate:	<input type="text"/>
Vehicle Details:	<i>Make:</i>	<i>Model:</i>	<i>Year:</i>	<i>Manual/Auto</i>	
Owner:	<input type="text"/>	Current value:	<input type="text"/>	Loan balance:	<input type="text"/>
Lender:	<input type="text"/>	Monthly repayment:	<input type="text"/>	Interest rate:	<input type="text"/>

**Savings Accounts**

Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Bank/Institution:	<input type="text"/>
Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Bank/Institution:	<input type="text"/>
Account holder:	<input type="text"/>	Current value:	<input type="text"/>	Bank/Institution:	<input type="text"/>

**Details of Other Significant Assets or Liabilities**

*Please provide details (Type, value)*

**Comments**