

ENQUIRY FORM

APPLICANT 1

GIVEN NAME/S	
SURNAME	
D.O.B	
ADDRESS	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
PREVIOUS ADDRESS (IF ABOVE LESS THAN 3 YEARS)	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
HOME PHONE	
WORK PHONE	
MOBILE PHONE	
EMAIL	
MARITAL STATUS	
DEPENDANT (AGE/ DATE OF BIRTH)	

APPLICANT 2

GIVEN NAME/S	
SURNAME	
D.O.B	
ADDRESS	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
PREVIOUS ADDRESS (IF ABOVE LESS THAN 3 YEARS)	
DATE MOVED IN (MM/YY)	
OWNER/RENTING	
HOME PHONE	
WORK PHONE	
MOBILE PHONE	
EMAIL	
MARITAL STATUS	
DEPENDANT (AGE/ DATE OF BIRTH)	

EMPLOYMENT DETAILS

APPLICANT 1

EMPLOYER NAME	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	
GROSS ANNUAL INCOME (excl. super)	
OTHER INCOME (COMMISSION/BONUS)	
PREVIOUS EMPLOYER (IF CURRENT EMPLOYER LESS THAN 3 YEARS)	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	

APPLICANT 2

EMPLOYER NAME	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	
GROSS ANNUAL INCOME (excl. super)	
OTHER INCOME (COMMISSION/BONUS)	
PREVIOUS EMPLOYER (IF CURRENT EMPLOYER LESS THAN 3 YEARS)	
EMPLOYMENT TYPE (FULL/PART TIME/ CASUAL/SELF EMPLOYED)	
OCCUPATION	
DATE STARTED	
WORK ADDRESS	
WORK PHONE	

ASSETS

ITEM	DETAILS	VALUE	OTHER
PROPERTY 1		\$	RENTAL PW: SECURITY TO LOAN: Y <input type="checkbox"/> N <input type="checkbox"/>
PROPERTY 2		\$	RENTAL PW: SECURITY TO LOAN: Y <input type="checkbox"/> N <input type="checkbox"/>
PROPERTY 3		\$	RENTAL PW: SECURITY TO LOAN: Y <input type="checkbox"/> N <input type="checkbox"/>
MOTOR VEHICLE 1 (YEAR/ MAKE/MODEL)		\$	
MOTOR VEHICLE 2 (YEAR/MAKE/MODEL)		\$	
HOME CONTENTS		\$	
APPLICANT 1 SUPER		\$	
APPLICANT 2 SUPER		\$	
SAVINGS		\$	
SHARES & INVESTMENTS		\$	

LIABILITIES

ITEM	BANK/LENDER	BALANCE OWING	MONTHLY PAYMENT	INTEREST RATE
MORTGAGE 1	Principal & Interest <input type="checkbox"/> OR Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 2	Principal & Interest <input type="checkbox"/> OR Interest Only <input type="checkbox"/>	\$	\$	%
MORTGAGE 3	Principal & Interest <input type="checkbox"/> OR Interest Only <input type="checkbox"/>	\$	\$	%
CAR LOAN/S 1		\$	\$	%
CAR LOAN/S 2		\$	\$	%
OTHER LOAN/S		\$	\$	%
CREDIT CARD 1		\$	LIMIT \$	
CREDIT CARD 2		\$	LIMIT \$	
CREDIT CARD 3		\$	LIMIT \$	

LIVING EXPENSES

On a monthly basis, how much would you anticipate you spend on the following items?

ITEM	MONTHLY AMOUNT	COMMENTS
CHILDCARE	\$	
CLOTHING & PERSONAL CARE	\$	
EDUCATION	\$	
GROCERIES	\$	
INSURANCES	\$	
INVESTMENT PROPERTY EXPENSES	\$	
MEDICAL & HEALTH COSTS	\$	
OWNER OCCUPIED PROPERTY EXPENSES	\$	
RECREATION & ENTERTAINMENT	\$	
CONNECTIONS (Phone, Internet)	\$	
TRANSPORT	\$	
RENT OR BOARD	\$	
OTHER (please specify)	\$	

PERSONAL INSURANCE

DO YOU HAVE:	PROVIDER	SUM INSURED	UNSURE
LIFE INSURANCE		\$	<input type="checkbox"/>
DEBT PROTECTION		\$	<input type="checkbox"/>
INCOME PROTECTION		\$	<input type="checkbox"/>
HOME & CONTENTS INSURANCE		\$	<input type="checkbox"/>

YOUR LENDING PROFILE

What is the amount you would like to apply for?

\$

If purchasing, what is the expected purchase price?

\$

How long do you expect to retain the home loan for?

- 1-2 yrs 10+ yrs
 2-5 yrs Unsure
 5-10 yrs

What type of home loan repayment are you considering?

- Principle & Interest
 Interest Only
 Unsure

PURPOSE OF THE LOAN	TICK	COMMENTS Do you have an objective for seeking this loan?
PURCHASE HOME	<input type="checkbox"/>	
INVESTMENT PROPERTY	<input type="checkbox"/>	
RENOVATIONS	<input type="checkbox"/>	
DEBT CONSOLIDATION	<input type="checkbox"/>	
REFINANCE	<input type="checkbox"/>	
OTHER	<input type="checkbox"/>	

On a scale of 1-10:

1 2 3 4 5 6 7 8 9 10

How concerned are you about rising interest rates?

(1 is not concerned and 10 is highly concerned)

How would you rate your current job security?

(1 is not secure and 10 is highly secure)

LENDER SELECTION

LENDER INFORMATION	YES	NO	COMMENTS
Do you have a lender preference?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there any lenders that you wouldn't consider?	<input type="checkbox"/>	<input type="checkbox"/>	
LOAN & LENDING FEATURES	YES	NO	COMMENTS
Variable loan	<input type="checkbox"/>	<input type="checkbox"/>	
Fixed loan	<input type="checkbox"/>	<input type="checkbox"/>	
Split loan (part fixed and/or part variable)	<input type="checkbox"/>	<input type="checkbox"/>	
Offset account	<input type="checkbox"/>	<input type="checkbox"/>	
Access to lender branch network	<input type="checkbox"/>	<input type="checkbox"/>	
Access to Loan via ATM	<input type="checkbox"/>	<input type="checkbox"/>	
Credit card	<input type="checkbox"/>	<input type="checkbox"/>	
ANTICIPATED CHANGES	YES	NO	If you answered yes, please explain
Do you anticipate any changes to your income in the next 6-12 months?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you anticipate your expenses will change in the next 6-12 months?	<input type="checkbox"/>	<input type="checkbox"/>	

CREDIT HISTORY

Have you had any defaults? YES NO

Have you previously been declared bankrupt? YES NO

If yes, please provide details:

Are all of your current credit commitments up to date? YES NO

If no, please provide details including how you plan to bring your existing loan repayments up to date:

ACKNOWLEDGMENT OF RISK INSURANCE OFFERING

Insurance can be an effective way of minimising any potential financial hardship on you, your family and your business. Financial hardship may result from a death, disability, trauma or personal injury.

If you do not have adequate risk protection insurance in place:

- You may not be able to meet the repayments on your loan should an unexpected or unforeseen event arise; or
- Your savings may not be sufficient to meet your financial obligations.

We are able to offer an introduction to a 1st Street risk protection specialist that could assist you in the event of unforeseen circumstances.

- I/we acknowledge that I/we have been made aware of the opportunity to apply for risk insurance relating to my/our loan application.
- I/we understand that I am/we are not obliged to apply for risk insurance as a condition of my/our loan and that I am/we are able to arrange insurance through any insurer of my/our choice.

I/we would like to discuss our requirements further with a 1st Street Financial Services risk specialist who is able to discuss our specific needs.

I/we have decided not to have a discussion with an advisor.

ACCEPTANCE

By signing this document you acknowledge that you:

- Understand the offering of Risk Insurance and confirmation of your decision
- Consent to being contacted by 1st Street Financial Services
- Declare all details provided are true and correct

APPLICANT 1 Name

APPLICANT 1 Signature

DATE

APPLICANT 2 Name

APPLICANT 2 Signature

DATE

If you have any questions please feel free to contact us at any time to clarify any issues or concerns you may have.



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