



# Third Party Banking Home Loan Application

## Section 1 - Agent details

|  |  |  |   |
|--|--|--|---|
| Agent number<br><input style="width:100%;" type="text"/>   |  | Bank reference number<br><input style="width:100%;" type="text"/>  |   |
| Agent first name<br><input style="width:100%;" type="text"/>   |  | Agent last name<br><input style="width:100%;" type="text"/>  |   |
| Head group name<br><input style="width:100%;" type="text"/>  |  |  |   |
| Business address<br><input style="width:100%;" type="text"/>   |  | Relationship manager<br><input style="width:100%;" type="text"/>   |   |
| State <input style="width:100%;" type="text"/>   |  | Postcode <input style="width:100%;" type="text"/>  |   |
| Telephone number<br>( ) <input style="width:100%;" type="text"/>   | Fax number<br>( ) <input style="width:100%;" type="text"/> | Mobile phone number<br><input style="width:100%;" type="text"/>  | Email address<br><input style="width:100%;" type="text"/> |
| Number of Applicants <input style="width:100%;" type="text"/>  |  | Number of Guarantors <input style="width:100%;" type="text"/>  |   |
| Are all applicants First Home Buyers? <input type="checkbox"/> Yes <input type="checkbox"/> No   |  |  |   |
| <b>Applicant 1</b> <input type="checkbox"/> Individual <input type="checkbox"/> Company<br>Are you acting on behalf of a Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If 'Yes', please advise the Trust name<br><input style="width:100%;" type="text"/> |  | <b>Applicant 2</b> <input type="checkbox"/> Individual <input type="checkbox"/> Company<br>Are you acting on behalf of a Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If 'Yes', please advise the Trust name<br><input style="width:100%;" type="text"/> |   |
| <b>Guarantor 1</b> <input type="checkbox"/> Individual <input type="checkbox"/> Company<br>Are you acting on behalf of a Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If 'Yes', please advise the Trust name<br><input style="width:100%;" type="text"/> |  | <b>Guarantor 2</b> <input type="checkbox"/> Individual <input type="checkbox"/> Company<br>Are you acting on behalf of a Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If 'Yes', please advise the Trust name<br><input style="width:100%;" type="text"/> |   |

## Section 2 - Applicant details (You must be 18 years of age or over in order to apply for credit)

|   |   |  |  |   |  |   |
|---|---|--|--|---|--|---|
|   | Title   | Last name  | Given names                                  |   |  |   |
| Applicant 1   | <input style="width:100%;" type="text"/>            | <input style="width:100%;" type="text"/>   | <input style="width:100%;" type="text"/>     |   |  |   |
| Applicant 2   | <input style="width:100%;" type="text"/>            | <input style="width:100%;" type="text"/>   | <input style="width:100%;" type="text"/>     |   |  |   |
| Company name <input style="width:100%;" type="text"/> |   |  |  |   | ABN <input style="width:100%;" type="text"/> |   |
| <b>Marital status</b>                                 |   |  |  |   | <b>Date of birth</b>                         |   |
| Applicant 1   | <input type="checkbox"/> Single                     | <input type="checkbox"/> Married   | <input type="checkbox"/> De facto            | <input type="checkbox"/> Other                                      | <input style="width:100%;" type="text"/>     |   |
| Applicant 2   | <input type="checkbox"/> Single                     | <input type="checkbox"/> Married   | <input type="checkbox"/> De facto            | <input type="checkbox"/> Other                                      | <input style="width:100%;" type="text"/>     |   |
| <b>Number of dependant children and ages</b>          |   |  |  |   |  |   |
|   | Number  | Age 1  | Age 2  | Age 3   | Age 4  | Driver's licence number                                       |
| Applicant 1   | <input style="width:100%;" type="text"/>            | <input style="width:100%;" type="text"/>   | <input style="width:100%;" type="text"/>     | <input style="width:100%;" type="text"/>                            | <input style="width:100%;" type="text"/>     | <input style="width:100%;" type="text"/>                      |
| Applicant 2   | <input style="width:100%;" type="text"/>            | <input style="width:100%;" type="text"/>   | <input style="width:100%;" type="text"/>     | <input style="width:100%;" type="text"/>                            | <input style="width:100%;" type="text"/>     | <input style="width:100%;" type="text"/>                      |
| <b>Residential status</b>                             |   |  |  |   | <b>Sex</b>                                   |   |
| Applicant 1   | <input type="checkbox"/> Owner                      | <input type="checkbox"/> Mortgaged   | <input type="checkbox"/> Living with parents | <input type="checkbox"/> Boarding                                   | <input type="checkbox"/> Renting             | <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Applicant 2   | <input type="checkbox"/> Owner                      | <input type="checkbox"/> Mortgaged   | <input type="checkbox"/> Living with parents | <input type="checkbox"/> Boarding                                   | <input type="checkbox"/> Renting             | <input type="checkbox"/> Male <input type="checkbox"/> Female |
| <b>Residency status</b>                               |   |  |  |   |  |   |
| Applicant 1   | <input type="checkbox"/> Citizen/permanent resident | <input type="checkbox"/> Non resident (specify country) <input style="width:100%;" type="text"/> |  | <input type="checkbox"/> Non resident – exempt from withholding tax |  |   |
| Applicant 2   | <input type="checkbox"/> Citizen/permanent resident | <input type="checkbox"/> Non resident (specify country) <input style="width:100%;" type="text"/> |  | <input type="checkbox"/> Non resident – exempt from withholding tax |  |   |

## Section 2 - Applicant details – continued

(You must be 18 years of age or over in order to apply for credit)

### Current residential address

|             |  |       |          |
|-------------|--|-------|----------|
| Applicant 1 |  | State | Postcode |
| Applicant 2 |  | State | Postcode |

Date moved into current residential address

Applicant 1  Applicant 2

### Current mailing address (if different from residential address)

|             |  |       |          |
|-------------|--|-------|----------|
| Applicant 1 |  | State | Postcode |
| Applicant 2 |  | State | Postcode |

### Mailing address after loan settlement (if different from residential address)

|             |  |       |          |
|-------------|--|-------|----------|
| Applicant 1 |  | State | Postcode |
| Applicant 2 |  | State | Postcode |

### Previous residential address (if less than 2 years at current address)

|             |  |       |          |
|-------------|--|-------|----------|
| Applicant 1 |  | State | Postcode |
| Applicant 2 |  | State | Postcode |

Date moved in Date moved out

|             |                      |                      |
|-------------|----------------------|----------------------|
| Applicant 1 | <input type="text"/> | <input type="text"/> |
| Applicant 2 | <input type="text"/> | <input type="text"/> |

Telephone number Work number Mobile phone number

|             |     |     |  |
|-------------|-----|-----|--|
| Applicant 1 | ( ) | ( ) |  |
| Applicant 2 | ( ) | ( ) |  |

Email address

|             |  |
|-------------|--|
| Applicant 1 |  |
| Applicant 2 |  |

### Employment details

**Note:** If a second income is required for servicing, please photocopy and complete the employment and income sections and attach them to the application.

#### Occupation

Date commenced\*

|             |  |  |
|-------------|--|--|
| Applicant 1 |  |  |
| Applicant 2 |  |  |

\*Required for all Employment Types including Home Duties, Unemployment, etc.

#### Employment type

Applicant 1  PAYG  Self employed  Unemployed

Applicant 2  PAYG  Self employed  Unemployed

#### Employer type

Private  Public

Private  Public

#### Employment status

Applicant 1  Full time  Part time  Contract  Seasonal  Other

Temporary  Casual  Commission only  Home duties

Applicant 2  Full time  Part time  Contract  Seasonal  Other

Temporary  Casual  Commission only  Home duties

#### Employer's name

|             |  |
|-------------|--|
| Applicant 1 |  |
| Applicant 2 |  |

#### Employer's address

|             |  |       |          |
|-------------|--|-------|----------|
| Applicant 1 |  | State | Postcode |
| Applicant 2 |  | State | Postcode |

## Section 2 - Applicant details – continued

(You must be 18 years of age or over in order to apply for credit)

### Income details

#### Applicant 1 – income

|   | Gross yearly | Gross monthly |
|---|--------------|---------------|
| Base income   | \$           | \$            |
| Regular overtime  | \$           | \$            |
| Family payment  | \$           | \$            |
| Pension (record type)                                   | \$           | \$            |
| Investment income                                       | \$           | \$            |
| Rental (existing)                                       | \$           | \$            |
| Rental (proposed)                                       | \$           | \$            |
| Other eg. Commission, car allowance, etc. (record type) | \$           | \$            |
| Total income  | \$           | \$            |

#### Applicant 2 – income

|   | Gross yearly | Gross monthly |
|---|--------------|---------------|
| Base income   | \$           | \$            |
| Regular overtime  | \$           | \$            |
| Family payment  | \$           | \$            |
| Pension (record type)                                   | \$           | \$            |
| Investment income                                       | \$           | \$            |
| Rental (existing)                                       | \$           | \$            |
| Rental (proposed)                                       | \$           | \$            |
| Other eg. Commission, car allowance, etc. (record type) | \$           | \$            |
| Total income  | \$           | \$            |

### Proof of Identity details

Verification of Signatory – minimum 100 points required under the Financial Transaction Reports Act 1988.

To achieve 100 points identification the customer may present a mix of documents, comprising of one Primary Document and one or more Secondary Documents or entirely of Secondary Documents. For example:-

- Existing Commonwealth Bank customer - 100 points
- Driver's Licence, Social Security Card – 40 points
- Passport, Citizenship Certificate, Birth Certificate – 70 points
- Medicare Card/Rates Notices/Membership Card - 25 point

**Bank or agent use - Identification details** (eg. passport, driver's licence details, etc.) **must be completed in all cases where documentation is used for identification** (see <http://www.austrac.gov.au>)

#### Applicant 1

| Document type | Document number | Place of issue | Issue date | Expiry date | Points scored |              |
|---------------|-----------------|----------------|------------|-------------|---------------|--------------|
|               |                 |                |            |             |               | Total points |
|               |                 |                |            |             |               |              |
|               |                 |                |            |             |               |              |

#### Applicant 2

| Document type | Document number | Place of issue | Issue date | Expiry date | Points scored |              |
|---------------|-----------------|----------------|------------|-------------|---------------|--------------|
|               |                 |                |            |             |               | Total points |
|               |                 |                |            |             |               |              |
|               |                 |                |            |             |               |              |

## Section 3 - Guarantor details

|             | Title | Last name | Given names |
|-------------|-------|-----------|-------------|
| Guarantor 1 |       |           |             |
| Guarantor 2 |       |           |             |

Company name  ABN

#### Marital status

|             | <input type="checkbox"/> Single | <input type="checkbox"/> Married | <input type="checkbox"/> De facto | <input type="checkbox"/> Other | Date of birth |
|-------------|---------------------------------|----------------------------------|-----------------------------------|--------------------------------|---------------|
| Guarantor 1 |                                 |                                  |                                   |                                |               |
| Guarantor 2 |                                 |                                  |                                   |                                |               |

#### Number of dependant children and ages

|             | Number | Age 1 | Age 2 | Age 3 | Age 4 | Driver's licence number |
|-------------|--------|-------|-------|-------|-------|-------------------------|
| Guarantor 1 |        |       |       |       |       |                         |
| Guarantor 2 |        |       |       |       |       |                         |

#### Residential status

|             | <input type="checkbox"/> Owner | <input type="checkbox"/> Mortgaged | <input type="checkbox"/> Living with parents | <input type="checkbox"/> Boarding | <input type="checkbox"/> Renting | Sex   |
|-------------|--------------------------------|------------------------------------|--|-----------------------------------|----------------------------------|---|
| Guarantor 1 |                                |                                    |  |                                   |                                  | <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Guarantor 2 |                                |                                    |  |                                   |                                  | <input type="checkbox"/> Male <input type="checkbox"/> Female |

### Section 3 - Guarantor details – continued

#### Residency status

Guarantor 1  Citizen/permanent resident  Non resident (specify country)  Non resident – exempt from withholding tax

Guarantor 2  Citizen/permanent resident  Non resident (specify country)  Non resident – exempt from withholding tax

#### Current residential address

Guarantor 1  State  Postcode

Guarantor 2  State  Postcode

Date moved into current residential address

Guarantor 1  Guarantor 2

#### Current mailing address (if different from residential address)

Guarantor 1  State  Postcode

Guarantor 2  State  Postcode

#### Mailing address after loan settlement (if different from residential address)

Guarantor 1  State  Postcode

Guarantor 2  State  Postcode

#### Previous residential address (if less than 2 years at current address)

Guarantor 1  State  Postcode

Guarantor 2  State  Postcode

Date moved in Date moved out

Guarantor 1

Guarantor 2

Telephone number Work number Mobile phone number

Guarantor 1 ( ) ( )

Guarantor 2 ( ) ( )

Email address

Guarantor 1

Guarantor 2

#### Employment details

**Note:** If a second income is required for servicing, please photocopy and complete the employment plus income section and attach it with the application.

| Occupation                       | Date commenced*      |
|----------------------------------|----------------------|
| Guarantor 1 <input type="text"/> | <input type="text"/> |
| Guarantor 2 <input type="text"/> | <input type="text"/> |

\*Required for all Employment Types including Home Duties, Unemployment, etc.

#### Employment type

Guarantor 1  PAYG  Self employed  Unemployed

Guarantor 2  PAYG  Self employed  Unemployed

#### Employer type

Private  Public

Private  Public

#### Employment status

Guarantor 1  Full time  Part time  Contract  Seasonal  Other

Temporary  Casual  Commission only  Home duties

Guarantor 2  Full time  Part time  Contract  Seasonal  Other

Temporary  Casual  Commission only  Home duties

#### Employer's name

Guarantor 1

Guarantor 2

#### Employer's address

Guarantor 1  State  Postcode

Guarantor 2  State  Postcode

## Section 3 - Guarantor details continued

### Income details

#### Guarantor 1 – income

|   | Gross yearly | Gross monthly |
|---|--------------|---------------|
| Base income   | \$           | \$            |
| Regular overtime  | \$           | \$            |
| Family payment  | \$           | \$            |
| Pension (record type)                                   | \$           | \$            |
| Investment income                                       | \$           | \$            |
| Rental (existing)                                       | \$           | \$            |
| Rental (proposed)                                       | \$           | \$            |
| Other eg. Commission, car allowance, etc. (record type) | \$           | \$            |
| Total income  | \$           | \$            |

#### Guarantor 2 – income

|   | Gross yearly | Gross monthly |
|---|--------------|---------------|
| Base income   | \$           | \$            |
| Regular overtime  | \$           | \$            |
| Family payment  | \$           | \$            |
| Pension (record type)                                   | \$           | \$            |
| Investment income                                       | \$           | \$            |
| Rental (existing)                                       | \$           | \$            |
| Rental (proposed)                                       | \$           | \$            |
| Other eg. Commission, car allowance, etc. (record type) | \$           | \$            |
| Total income  | \$           | \$            |

### Proof of Identity details – refer page 3 for document values

#### Guarantor 1

| Document type | Document number | Place of issue | Issue date | Expiry date | Points scored |              |
|---------------|-----------------|----------------|------------|-------------|---------------|--------------|
|               |                 |                |            |             |               | Total points |
|               |                 |                |            |             |               |              |
|               |                 |                |            |             |               |              |

#### Guarantor 2

| Document type | Document number | Place of issue | Issue date | Expiry date | Points scored |              |
|---------------|-----------------|----------------|------------|-------------|---------------|--------------|
|               |                 |                |            |             |               | Total points |
|               |                 |                |            |             |               |              |
|               |                 |                |            |             |               |              |

## Section 4 – Company/Trust details

Type of business  ABN

|            | Title                | Last name            | Given names          | Driver's licence number |
|------------|----------------------|----------------------|----------------------|-------------------------|
| Director 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>    |
| Director 2 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>    |

#### Current residential address

|            |                      |       |          |
|------------|----------------------|-------|----------|
| Director 1 | <input type="text"/> | State | Postcode |
| Director 2 | <input type="text"/> | State | Postcode |

|            | Telephone number         | Work number              | Fax number               | Mobile phone number  |
|------------|--------------------------|--------------------------|--------------------------|----------------------|
| Director 1 | ( ) <input type="text"/> | ( ) <input type="text"/> | ( ) <input type="text"/> | <input type="text"/> |
| Director 2 | ( ) <input type="text"/> | ( ) <input type="text"/> | ( ) <input type="text"/> | <input type="text"/> |

### Proof of Identity details – refer page 3 for document values

#### Director 1

| Document type | Document number | Place of issue | Issue date | Expiry date | Points scored |              |
|---------------|-----------------|----------------|------------|-------------|---------------|--------------|
|               |                 |                |            |             |               | Total points |
|               |                 |                |            |             |               |              |
|               |                 |                |            |             |               |              |

## Section 4 – Company/Trust details – continued

| Director 2    |                 |                |            |             |  | Points scored | Total points |
|---------------|-----------------|----------------|------------|-------------|--|---------------|--------------|
| Document type | Document number | Place of issue | Issue date | Expiry date |  |               |              |
|               |                 |                |            |             |  |               |              |
|               |                 |                |            |             |  |               |              |
|               |                 |                |            |             |  |               |              |

## Section 5 - Assets

|  |   | Ownership (Tick one)     |                          |                          |                          | Value |
|--|---|--------------------------|--------------------------|--------------------------|--------------------------|-------|
|  |   | Appl 1                   | Appl 2                   | Joint                    | Other (please specify)   |       |
| <b>Real estate</b>                       | Address (only record where property is used as security)                          |                          |                          |                          |                          |       |
| Property 1                               |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| Property 2                               |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| Property 3                               |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Motor vehicles</b>                    | Make/model/year   |                          |                          |                          |                          |       |
| Car 1                                    |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| Car 2                                    |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Savings/ investments</b>              | Name of institute   |                          |                          |                          |                          |       |
| Account 1                                |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| Account 2                                |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| Account 3                                |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Investments</b>                       | Type of investment (such as Bonds, Shares, Debentures etc.) and name of institute |                          |                          |                          |                          |       |
| Investment 1                             |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| Investment 2                             |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Deposit paid on purchase property</b> |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Home contents (insured value)</b>     |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Superannuation (face value)</b>       | Name of institution   |                          |                          |                          |                          |       |
|  |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |
| <b>Other</b>                             | Type of asset eg. boat, caravan, etc.   |                          |                          |                          |                          |       |
|  |   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    |

## Section 6 - Liabilities

|   |                                  | Ownership (Tick one)     |                          |                          |                          | Limit | Total amount owing | Monthly payments | To cease |
|---|----------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------|--------------------|------------------|----------|
|   |                                  | Appl 1                   | Appl 2                   | Joint                    | Other (please specify)   |       |                    |                  |          |
| <b>Existing mortgages</b>                       | Account number and Lender's name |                          |                          |                          |                          |       |                    |                  |          |
| Loan 1  |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Loan 2  |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Loan 3  |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Loan 4  |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Loan 5  |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Credit cards/store cards</b>                 | Account number and Lender's name |                          |                          |                          |                          |       |                    |                  |          |
| Account 1                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Account 2                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Account 3                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Account 4                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Account 5                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Personal lines of credit/overdrafts</b>      | Account number and Lender's name |                          |                          |                          |                          |       |                    |                  |          |
| Account 1                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| Account 2                                       |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Personal loans/Leasing/Hire purchase</b>     | Account number and Lender's name |                          |                          |                          |                          |       |                    |                  |          |
|   |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Debts guaranteed by you</b>                  | Lender's name                    |                          |                          |                          |                          |       |                    |                  |          |
| Debt 1  |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Rent/board</b>                               |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Child maintenance</b>                        |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |
| <b>Other. Please specify eg. Taxation, HECs</b> | Description                      |                          |                          |                          |                          |       |                    |                  |          |
|   |                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$    | \$                 | \$               |          |

## Section 7 - Loan details

|               |  | Loan options   |  |  |  |                                |
|---------------|--|--|--|--|--|--------------------------------|
| <b>Loan 1</b> | <input type="checkbox"/> Owner occupied<br><input type="checkbox"/> Investment | <input type="checkbox"/> Standard Variable Rate<br><input type="checkbox"/> 12 Month Discounted<br><input type="checkbox"/> 1 Year Guaranteed<br>Rate Lock (1 year Guaranteed)<br><input type="checkbox"/> Yes <input type="checkbox"/> No | <b>Line of Credit</b><br><input type="checkbox"/> Reference Rate<br><input type="checkbox"/> Residential Equity Rate<br><b>Rate Saver</b><br><input type="checkbox"/> 3 Year Special<br><input type="checkbox"/> Standard Rate Saver | <input type="checkbox"/> Fixed Rate<br><input type="text"/> years<br>Rate Lock<br><input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Equity Advantage (Products selected previously are the sub-accounts)<br><b>Umbrella limit requested</b> \$ <input type="text"/> | <input type="checkbox"/> Other |
| <b>Loan 2</b> | <input type="checkbox"/> Owner occupied<br><input type="checkbox"/> Investment | <input type="checkbox"/> Standard Variable Rate<br><input type="checkbox"/> 12 Month Discounted<br><input type="checkbox"/> 1 Year Guaranteed<br>Rate Lock (1 year Guaranteed)<br><input type="checkbox"/> Yes <input type="checkbox"/> No | <b>Line of Credit</b><br><input type="checkbox"/> Reference Rate<br><input type="checkbox"/> Residential Equity Rate<br><b>Rate Saver</b><br><input type="checkbox"/> 3 Year Special<br><input type="checkbox"/> Standard Rate Saver | <input type="checkbox"/> Fixed Rate<br><input type="text"/> years<br>Rate Lock<br><input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Equity Advantage (Products selected previously are the sub-accounts)<br><b>Umbrella limit requested</b> \$ <input type="text"/> | <input type="checkbox"/> Other |
| <b>Loan 3</b> | <input type="checkbox"/> Owner occupied<br><input type="checkbox"/> Investment | <input type="checkbox"/> Standard Variable Rate<br><input type="checkbox"/> 12 Month Discounted<br><input type="checkbox"/> 1 Year Guaranteed<br>Rate Lock (1 year Guaranteed)<br><input type="checkbox"/> Yes <input type="checkbox"/> No | <b>Line of Credit</b><br><input type="checkbox"/> Reference Rate<br><input type="checkbox"/> Residential Equity Rate<br><b>Rate Saver</b><br><input type="checkbox"/> 3 Year Special<br><input type="checkbox"/> Standard Rate Saver | <input type="checkbox"/> Fixed Rate<br><input type="text"/> years<br>Rate Lock<br><input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Equity Advantage (Products selected previously are the sub-accounts)<br><b>Umbrella limit requested</b> \$ <input type="text"/> | <input type="checkbox"/> Other |

### What is the purpose of the loan?

|               | Loan purpose   | Purpose amount | Loan purpose  | Purpose amount |
|---------------|--|----------------|---|----------------|
| <b>Loan 1</b> | <input type="checkbox"/> To build a house                          | \$             | <input type="checkbox"/> To buy an existing house (over 1 year old) | \$             |
|               | <input type="checkbox"/> To buy land                               | \$             | <input type="checkbox"/> To buy a home (Home seeker)                | \$             |
|               | <input type="checkbox"/> Off the Plan                              | \$             | <input type="checkbox"/> Home improvement                           | \$             |
|               | <input type="checkbox"/> To buy a new house (less than 1 year old) | \$             | <input type="checkbox"/> Debt consolidation                         | \$             |
|               | <input type="checkbox"/> Refinance existing loan (complete below)  | \$             | <input type="checkbox"/> Personal borrowings eg. car/boat/holiday   | \$             |
| <b>Loan 2</b> | <input type="checkbox"/> To build a house                          | \$             | <input type="checkbox"/> To buy an existing house (over 1 year old) | \$             |
|               | <input type="checkbox"/> To buy land                               | \$             | <input type="checkbox"/> To buy a home (Home seeker)                | \$             |
|               | <input type="checkbox"/> Off the Plan                              | \$             | <input type="checkbox"/> Home improvement                           | \$             |
|               | <input type="checkbox"/> To buy a new house (less than 1 year old) | \$             | <input type="checkbox"/> Debt consolidation                         | \$             |
|               | <input type="checkbox"/> Refinance existing loan (complete below)  | \$             | <input type="checkbox"/> Personal borrowings eg. car/boat/holiday   | \$             |
| <b>Loan 3</b> | <input type="checkbox"/> To build a house                          | \$             | <input type="checkbox"/> To buy an existing house (over 1 year old) | \$             |
|               | <input type="checkbox"/> To buy land                               | \$             | <input type="checkbox"/> To buy a home (Home seeker)                | \$             |
|               | <input type="checkbox"/> Off the Plan                              | \$             | <input type="checkbox"/> Home improvement                           | \$             |
|               | <input type="checkbox"/> To buy a new house (less than 1 year old) | \$             | <input type="checkbox"/> Debt consolidation                         | \$             |
|               | <input type="checkbox"/> Refinance existing loan (complete below)  | \$             | <input type="checkbox"/> Personal borrowings eg. car/boat/holiday   | \$             |

### Refinance existing loan/s

|                      | Loan 1 | Loan 2 | Loan 3 |
|----------------------|--------|--------|--------|
| Existing lender name |        |        |        |
| BSB                  |        |        |        |
| Account number       |        |        |        |
| Loan balance         | \$     | \$     | \$     |

**Section 7 - Loan details – continued**

Is a Property Settlement required? No  Yes  approximate settlement date

Is a simultaneous settlement to apply for all loans included in this application? No  Yes

Loan offer document to be sent to  Customer  Agent  Solicitor  To be collected at Mortgage Services

**Solicitor's details**  Acting for self  Solicitor  Licensed Conveyance/Settlement Agent (WA)

Name

Address

 State  Postcode 

Telephone number

 ( ) 

Fax number

 ( ) 

Mobile phone number

Email address

|  | Loan 1  | Loan 2  | Loan 3  |
|--|---|---|---|
| Existing loan amount   | \$ <input type="text"/>   | \$ <input type="text"/>   | \$ <input type="text"/>   |
| New loan amount  | \$ <input type="text"/>   | \$ <input type="text"/>   | \$ <input type="text"/>   |
| Total loan amount  | \$ <input type="text"/>   | \$ <input type="text"/>   | \$ <input type="text"/>   |
| Interest rate (incl. discounts/margins)  | <input type="text"/> %  | <input type="text"/> %  | <input type="text"/> %  |
| Line of credit margin  | <input type="text"/>  | <input type="text"/>  | <input type="text"/>  |
| Loan term  | <input type="text"/>  | <input type="text"/>  | <input type="text"/>  |
| Interest only period   | <input type="text"/>  | <input type="text"/>  | <input type="text"/>  |
| Repayment details<br><b>Note:</b> For Interest Only and Interest in Advance Payments, 'Other' Repayment Method cannot be selected. | <b>Instalment frequency</b><br><input type="checkbox"/> W <input type="checkbox"/> F <input type="checkbox"/> M <input type="checkbox"/> Y<br><b>Repayment amount</b><br><input type="checkbox"/> Minimum or \$ <input type="text"/><br><b>Repayment options</b><br><input type="checkbox"/> P and I <input type="checkbox"/> Interest only<br><input type="checkbox"/> Interest in Advance period <input type="text"/><br><b>Repayment method</b><br><input type="checkbox"/> New Commonwealth Bank transactional account to be opened<br><input type="checkbox"/> Existing Commonwealth Bank transactional account<br>Name <input type="text"/><br>BSB <input type="text"/><br>AC No. <input type="text"/><br><input type="checkbox"/> Other <input type="text"/> | <b>Instalment frequency</b><br><input type="checkbox"/> W <input type="checkbox"/> F <input type="checkbox"/> M <input type="checkbox"/> Y<br><b>Repayment amount</b><br><input type="checkbox"/> Minimum or \$ <input type="text"/><br><b>Repayment options</b><br><input type="checkbox"/> P and I <input type="checkbox"/> Interest only<br><input type="checkbox"/> Interest in Advance period <input type="text"/><br><b>Repayment method</b><br><input type="checkbox"/> New Commonwealth Bank transactional account to be opened<br><input type="checkbox"/> Existing Commonwealth Bank transactional account<br>Name <input type="text"/><br>BSB <input type="text"/><br>AC No. <input type="text"/><br><input type="checkbox"/> Other <input type="text"/> | <b>Instalment frequency</b><br><input type="checkbox"/> W <input type="checkbox"/> F <input type="checkbox"/> M <input type="checkbox"/> Y<br><b>Repayment amount</b><br><input type="checkbox"/> Minimum or \$ <input type="text"/><br><b>Repayment options</b><br><input type="checkbox"/> P and I <input type="checkbox"/> Interest only<br><input type="checkbox"/> Interest in Advance period <input type="text"/><br><b>Repayment method</b><br><input type="checkbox"/> New Commonwealth Bank transactional account to be opened<br><input type="checkbox"/> Existing Commonwealth Bank transactional account<br>Name <input type="text"/><br>BSB <input type="text"/><br>AC No. <input type="text"/><br><input type="checkbox"/> Other <input type="text"/> |
| Top Up an existing loan  | BSB and account no. <input type="checkbox"/> Yes <input type="text"/>   | BSB and account no. <input type="checkbox"/> Yes <input type="text"/>   | BSB and account no. <input type="checkbox"/> Yes <input type="text"/>   |
| Low Doc loan (must apply to all)   | <input type="checkbox"/> Yes  | <input type="checkbox"/> Yes  | <input type="checkbox"/> Yes  |
| Bridging   | <input type="checkbox"/> Yes  | <input type="checkbox"/> Yes  | <input type="checkbox"/> Yes  |
| Guarantor support  | Security <input type="checkbox"/> Yes<br>Servicing <input type="checkbox"/> Yes<br>Security/servicing <input type="checkbox"/> Yes  | Security <input type="checkbox"/> Yes<br>Servicing <input type="checkbox"/> Yes<br>Security/servicing <input type="checkbox"/> Yes  | Security <input type="checkbox"/> Yes<br>Servicing <input type="checkbox"/> Yes<br>Security/servicing <input type="checkbox"/> Yes  |
| Packages   | Package type <input type="checkbox"/> MAV <input type="checkbox"/> MAV Plus Existing package <input type="checkbox"/> Yes<br>Name of Package holder: First name <input type="text"/> Surname <input type="text"/><br>Total Footings \$ <input type="text"/><br>MAV discount to apply: Loan 1 <input type="text"/> % Loan 2 <input type="text"/> % Loan 3 <input type="text"/> %   |   |   |

## Section 7 - Loan details – continued

|                            | Loan 1                       | Loan 2                       | Loan 3                       |
|----------------------------|------------------------------|------------------------------|------------------------------|
| <b>Discounts</b>           |                              |                              |                              |
| Special campaign name      |                              |                              |                              |
| Rate discount              | %                            | %                            | %                            |
| Fee discount               |                              |                              |                              |
| <b>Other</b>               |                              |                              |                              |
| Bulk reduction             | Reduction amount             | Reduction amount             | Reduction amount             |
|                            | \$                           | \$                           | \$                           |
|                            | Reduction date               | Reduction date               | Reduction date               |
| Progress payments required | <input type="checkbox"/> Yes | <input type="checkbox"/> Yes | <input type="checkbox"/> Yes |

## Section 8 - Security

Number of purchasing securities?  Homeseeker Loan? Yes  No

**Property address 1**  Loan 1  Loan 2  Loan 3

Building name  Unit  Street number  Street name

Street type  Suburb  State  Postcode

Title particulars Volume/folio or Lot and DP or folio identifier number  Registered Owners/Proprietors (name/s to appear on Certificate of Title)

**Property address 2**  Loan 1  Loan 2  Loan 3

Building name  Unit  Street number  Street name

Street type  Suburb  State  Postcode

Title particulars Volume/folio or Lot and DP or folio identifier number  Registered Owners/Proprietors (name/s to appear on Certificate of Title)

**Property address 3**  Loan 1  Loan 2  Loan 3

Building name  Unit  Street number  Street name

Street type  Suburb  State  Postcode

Title particulars Volume/folio or Lot and DP or folio identifier number  Registered Owners/Proprietors (name/s to appear on Certificate of Title)

**Valuation details**

|            | Source document                      | Date of document | Value | LVR          | Support available |
|------------|--------------------------------------|------------------|-------|--------------|-------------------|
| Property 1 |                                      |                  | \$    | %            |                   |
| Property 2 |                                      |                  | \$    | %            |                   |
| Property 3 |                                      |                  | \$    | %            |                   |
|            |                                      |                  |       | <b>Total</b> | \$                |
|            | Bank Liability against this Security |                  |       |              | \$                |
|            | LVR                                  |                  |       |              | %                 |

**Note:** Where the LVR is more than 80%, Lender's Mortgage Insurance (LMI) is required.

## Section 9 - Valuation access details

|                   | Contact for access<br>(for valuation purpose)   | Property usage   | Property zoning   | What type of property is it?   |
|-------------------|---|--|---|--|
| <b>Property 1</b> | <input type="checkbox"/> Applicant <input type="checkbox"/> Agent/Vendor <input type="checkbox"/> Tenant<br>Access name<br><input type="text"/><br>Phone/mobile no.<br><input type="text"/> | <input type="checkbox"/> Owner occupied<br><input type="checkbox"/> Investment | <input type="checkbox"/> Residential<br><input type="checkbox"/> Rural<br>Complete for rural:<br><input type="checkbox"/> Rural residential<br><input type="checkbox"/> Income producing<br><input type="checkbox"/> Rural life | <input type="checkbox"/> Semi detached house<br><input type="checkbox"/> Fully detached house<br><input type="checkbox"/> Strata title unit<br><input type="checkbox"/> Duplex <input type="checkbox"/> Studio apt<br><input type="checkbox"/> Service apt <input type="checkbox"/> Terrace<br><input type="checkbox"/> Vacant land <input type="checkbox"/> Townhouse |
| <b>Property 2</b> | <input type="checkbox"/> Applicant <input type="checkbox"/> Agent/Vendor <input type="checkbox"/> Tenant<br>Access name<br><input type="text"/><br>Phone/mobile no.<br><input type="text"/> | <input type="checkbox"/> Owner occupied<br><input type="checkbox"/> Investment | <input type="checkbox"/> Residential<br><input type="checkbox"/> Rural<br>Complete for rural:<br><input type="checkbox"/> Rural residential<br><input type="checkbox"/> Income producing<br><input type="checkbox"/> Rural life | <input type="checkbox"/> Semi detached house<br><input type="checkbox"/> Fully detached house<br><input type="checkbox"/> Strata title unit<br><input type="checkbox"/> Duplex <input type="checkbox"/> Studio apt<br><input type="checkbox"/> Service apt <input type="checkbox"/> Terrace<br><input type="checkbox"/> Vacant land <input type="checkbox"/> Townhouse |
| <b>Property 3</b> | <input type="checkbox"/> Applicant <input type="checkbox"/> Agent/Vendor <input type="checkbox"/> Tenant<br>Access name<br><input type="text"/><br>Phone/mobile no.<br><input type="text"/> | <input type="checkbox"/> Owner occupied<br><input type="checkbox"/> Investment | <input type="checkbox"/> Residential<br><input type="checkbox"/> Rural<br>Complete for rural:<br><input type="checkbox"/> Rural residential<br><input type="checkbox"/> Income producing<br><input type="checkbox"/> Rural life | <input type="checkbox"/> Semi detached house<br><input type="checkbox"/> Fully detached house<br><input type="checkbox"/> Strata title unit<br><input type="checkbox"/> Duplex <input type="checkbox"/> Studio apt<br><input type="checkbox"/> Service apt <input type="checkbox"/> Terrace<br><input type="checkbox"/> Vacant land <input type="checkbox"/> Townhouse |

## Section 10 - Funding summary

| Cost of purchase or refinance  |           | Your contribution to purchase or refinance  |  |
|--|-----------|---|--|
| Purchase price or refinance amount   | \$        | First Home Owners' Grant Scheme   | \$   |
| Other debt being refinanced/other costs  |           | Net proceeds from sale of property  | \$   |
| Legal fees (your solicitor)  | \$        | Deposit paid  | \$   |
| <input type="checkbox"/> Paid <input type="checkbox"/> To be disbursed at settlement |           | Cash/savings  | \$   |
| Cost of construction/home improvement  | \$        | Gift  | \$   |
| Other costs (specify)  | \$        | Other loans (specify source)  | \$   |
| Surplus  | \$        |   | \$   |
|  |           |   | \$   |
|  |           | Other funds (specify source)  | \$   |
|  |           |   | \$   |
|  |           |   | \$   |
|  |           | Total applicant/s contribution  | \$   |
|  |           | Total loan amount requested   | \$   |
|  |           | <b>Total funds available (should be at least equal Total cost)</b>  | <b>\$</b>  |
| <b>Total available</b>   |           |   |  |
| Bank fees to be paid from loan account   |           | Bank fees to be paid from related account   |  |
| Establishment fee  | \$        | Rate Lock fee   | \$   |
| Additional security fee  | \$        |   |  |
| Security guarantee fee   | \$        |   |  |
| LMI premium and stamp duty   | \$        |   |  |
| LMI arrangement fee  | \$        |   |  |
| Settlement Attendance fee  | \$        |   |  |
| <b>Total fees financed</b>   | <b>\$</b> |   |  |
|  |           | Have you provided evidence that funds are available for completion of the purchase?<br>Yes <input type="checkbox"/> No <input type="checkbox"/> |  |
| Government fees  |           | To be paid  |  |
| Stamp duty on mortgage   | \$        | <input type="checkbox"/> Pay from account   | <input type="checkbox"/> Pay from loan account                     |
| Mortgage Registration  | \$        | <input type="checkbox"/> Pay from account   | <input type="checkbox"/> Pay from loan account                     |
| Stamp duty on transfer of property   | \$        | <input type="checkbox"/> Paid   | <input type="checkbox"/> To be disbursed at settlement             |
|  |           | <input type="checkbox"/> Yet to be paid   | <input type="checkbox"/> Pay from loan account prior to settlement |
| <b>Total fees financed</b>   | <b>\$</b> |   |  |