



LOAN APPLICATION

PERSONAL DETAILS OF APPLICANT 1

Surname _____
 Mr Mrs Ms Miss Dr

First Name _____
Middle Name _____
Date of Birth _____
Country of Birth _____

NZ Residency Held? Yes No
Marital Status Married Defacto Single
Sex Male Female
Smoker? Yes No

Age of Dependants
____ / ____ / ____ / ____

Current Residential Address
Street: _____ Suburb: _____
City: _____ Postcode: _____

Postal Address (if different from above)
Street: _____ Suburb: _____
City: _____ Postcode: _____

Time there Years Months
If less than 3 years what was your previous address
Street: _____ Suburb: _____
City: _____ Postcode: _____

Time there Years Months
Are you currently? Renting Boarding
 Living in own home Other

Home Phone _____ Work Phone _____
Mobile Phone _____
Email Home _____ Work _____

EMPLOYMENT

Main Source of Income Salary/Wages Self Employed
 Other

Occupation _____
Employer/Business Name _____
Type of Business _____
How Long ____ Years ____ Months
Gross Income \$ _____
If less than 3 years - prior to that:

Years
 Months
 Years
 Months

PERSONAL DETAILS OF APPLICANT 2

Surname _____
 Mr Mrs Ms Miss Dr

First Name _____
Middle Name _____
Date of Birth _____
Country of Birth _____

NZ Residency Held? Yes No
Marital Status Married Defacto Single
Sex Male Female
Smoker? Yes No

Age of Dependants
____ / ____ / ____ / ____

Current Residential Address
Street: _____ Suburb: _____
City: _____ Postcode: _____

Postal Address (if different from above)
Street: _____ Suburb: _____
City: _____ Postcode: _____

Time there Years Months
If less than 3 years what was your previous address
Street: _____ Suburb: _____
City: _____ Postcode: _____

Time there Years Months
Are you currently? Renting Boarding
 Living in own home Other

Home Phone _____ Work Phone _____
Mobile Phone _____
Email Home _____ Work _____

EMPLOYMENT

Main Source of Income Salary/Wages Self Employed
 Other

Occupation _____
Employer/Business Name _____
Type of Business _____
How Long ____ Years ____ Months
Gross Income \$ _____
If less than 3 years - prior to that:

Years
 Months
 Years
 Months



LOAN APPLICATION

PROPOSED MONTHLY INCOME & EXPENDITURE

| INCOME | | Annual Gross | Monthly Net |
|---|--|-----------------|-----------------|
| Salary/Wage 1 | | \$ _____ | \$ _____ |
| 2 | | \$ _____ | \$ _____ |
| Business 1 | | \$ _____ | \$ _____ |
| 2 | | \$ _____ | \$ _____ |
| Benefits 1 | | \$ _____ | \$ _____ |
| 2 | | \$ _____ | \$ _____ |
| Interest/Dividends | | \$ _____ | \$ _____ |
| Other | | \$ _____ | \$ _____ |
| Rental (as below) Scaled @ | | \$ _____ | \$ _____ |
| Boarder/Flatmate \$ _____ per week @ _____ % | | \$ _____ | \$ _____ |
| TOTAL INCOME | | \$ _____ | \$ _____ |

A

| RENTAL INCOME | | Per Week |
|-------------------------------------|---|-----------------|
| 1. Address | Street: _____ Suburb: _____ City: _____ Postcode: _____ | \$ _____ |
| 2. Address | Street: _____ Suburb: _____ City: _____ Postcode: _____ | \$ _____ |
| 3. Address | Street: _____ Suburb: _____ City: _____ Postcode: _____ | \$ _____ |
| 4. Address | Street: _____ Suburb: _____ City: _____ Postcode: _____ | \$ _____ |
| 5. Address | Street: _____ Suburb: _____ City: _____ Postcode: _____ | \$ _____ |
| TOTAL RENTAL INCOME PER WEEK | | \$ _____ |

| EXPENSES | | PROPOSED MONTHLY |
|---|----------------------|------------------|
| Rental Property Mortgages | \$ _____ @ _____ yrs | \$ _____ |
| | \$ _____ @ _____ yrs | \$ _____ |
| | \$ _____ @ _____ yrs | \$ _____ |
| SUB TOTAL B | | \$ _____ |
| Other Mortgage Payments (including Rev. Credit) | | |
| | \$ _____ @ _____ yrs | \$ _____ |
| | \$ _____ @ _____ yrs | \$ _____ |
| | \$ _____ @ _____ yrs | \$ _____ |
| | \$ _____ @ _____ yrs | \$ _____ |
| Student Loans | Balance \$ _____ | \$ _____ |
| Student Loans | Balance \$ _____ | \$ _____ |
| Hire Purchase | | |
| Lender | _____ | \$ _____ |
| Lender | _____ | \$ _____ |
| Other Loans | | |
| Lender | _____ | \$ _____ |
| Lender | _____ | \$ _____ |
| Credit/Charge Cards Limit(s) | \$ _____ \$ _____ | \$ _____ |
| Store Cards | Limit(s) \$ _____ | \$ _____ |
| Child Support/Child Care | | \$ _____ |
| Rent to pay (\$ _____ per week) | | \$ _____ |
| Compulsory Superannuation | | \$ _____ |
| SUB TOTAL C | | \$ _____ |
| SUB TOTAL D (B+C) | | \$ _____ |
| PLUS | | |
| Income Protection Ins/MPI Allowance/Cost | | \$ _____ |
| Life Insurance Allowance/Cost | | \$ _____ |
| Contents Insurance | | \$ _____ |
| Dwelling Insurance | | \$ _____ |
| Dwelling Rates (incl. water rates) | | \$ _____ |
| Medical Insurance | | \$ _____ |
| Motor Vehicle Insurance | | \$ _____ |
| Motor Vehicle Running & Reg. | | \$ _____ |
| Power/Telephone/Gas | | \$ _____ |
| Voluntary Superannuation | | \$ _____ |
| Food/Clothing/General | | \$ _____ |
| SUB TOTAL E | | \$ _____ |
| TOTAL MONTHLY EXPENSES (D+E) | | \$ _____ |
| NET MONTHLY INCOME (A) | | \$ _____ |
| NET MONTHLY SURPLUS | | \$ _____ |

B

C

D

E



LOAN APPLICATION

STATEMENT OF ASSETS AND LIABILITIES (AT DATE OF APPLICATION)

| ASSETS (approximately) | LIABILITIES (approximately) |
|---|--|
| Main Bank/Branch | Overdraft Limit \$ _____ |
| Money @ Bank/Other 1 _____ \$ _____ | Bank _____ \$ _____ |
| 2 _____ \$ _____ | Mortgages 1 Bank _____ \$ _____ |
| 3 _____ \$ _____ | 2 Bank _____ \$ _____ |
| Property | 3 Bank _____ \$ _____ |
| 1. _____ \$ _____ | 4 Bank _____ \$ _____ |
| 2. _____ \$ _____ | 5 Bank _____ \$ _____ |
| 3. _____ \$ _____ | Personal Loan 1 From _____ \$ _____ |
| 4. _____ \$ _____ | 2 From _____ \$ _____ |
| 5. _____ \$ _____ | Hire Purchase 1 From _____ \$ _____ |
| Shares _____ \$ _____ | 2 From _____ \$ _____ |
| Vehicles 1 _____ \$ _____ | Credit/Store/Charge Cards |
| 2 _____ \$ _____ | Limit \$ _____ \$ _____ |
| 3 _____ \$ _____ | From _____ <input type="checkbox"/> |
| Superannuation 1 _____ (SV) \$ _____ | Limit \$ _____ \$ _____ |
| 2 _____ (SV) \$ _____ | From _____ <input type="checkbox"/> |
| Life Insurance 1 _____ \$ _____ (SV) \$ _____ | Limit \$ _____ \$ _____ |
| 2 _____ \$ _____ (SV) \$ _____ | From _____ <input type="checkbox"/> |
| 3 _____ \$ _____ (SV) \$ _____ | Student Loans _____ \$ _____ \$ _____ |
| Business Value(net) _____ \$ _____ | Other Liabilities _____ \$ _____ |
| Boat/Caravan _____ \$ _____ | _____ \$ _____ |
| Other 1 _____ \$ _____ | _____ \$ _____ |
| 2 _____ \$ _____ | _____ \$ _____ |
| 3 _____ \$ _____ | _____ \$ _____ |
| Furniture Et Personal Effects _____ \$ _____ | TOTAL LIABILITIES \$ _____ |
| TOTAL ASSETS \$ _____ | NET SURPLUS \$ _____ |
| | TOTAL (Per Total Assets) \$ _____ |

Are you guaranteeing a loan for any other persons. Yes (If yes provide details) No
