

PERSONAL AND EMPLOYMENT DETAILS		
	Individual 1	Individual 2
Title eg: Mr/Mrs/Ms/Miss/Dr		
Surname		
Given Name/s		
Phone Numbers	Work:	Work:
	Home:	Home:
	Mobile:	Mobile:
Email Address:		
Preferred contact time and method:		
Referred by:		
Income & Expenses (please circle payment frequencies as applicable)		
Normal After Tax Income	\$ <input type="checkbox"/> Weekly <input type="checkbox"/> F/nightly <input type="checkbox"/> Monthly	\$ <input type="checkbox"/> Weekly <input type="checkbox"/> F/nightly <input type="checkbox"/> Monthly
Regular Bonuses or Overtime	\$ <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Yearly	\$ <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Yearly
Secondary After Tax Income	\$ <input type="checkbox"/> Weekly <input type="checkbox"/> F/nightly <input type="checkbox"/> Monthly	\$ <input type="checkbox"/> Weekly <input type="checkbox"/> F/nightly <input type="checkbox"/> Monthly
Current Savings Balance:	\$	\$
Estimated Average Monthly Expenses (not including loan repayments)	\$	\$
Existing Loan/s (please circle as applicable)		
Loan 1	Loan 2	
Type: <input type="checkbox"/> mortgage <input type="checkbox"/> personal loan <input type="checkbox"/> other	Type: <input type="checkbox"/> mortgage <input type="checkbox"/> personal loan <input type="checkbox"/> other	
Loan Purpose: <input type="checkbox"/> personal <input type="checkbox"/> investment <input type="checkbox"/> other	Loan Purpose: <input type="checkbox"/> personal <input type="checkbox"/> investment <input type="checkbox"/> other	
Lender:	Lender:	
Original Value:	Original Value:	
Current Balance:	Current Balance:	
No of Years held:	No of Years held:	
Interest Rate:	Interest Rate:	
Repayment Type: <input type="checkbox"/> Interest Only <input type="checkbox"/> Principle & Interest	Repayment Type: <input type="checkbox"/> Interest Only <input type="checkbox"/> Principle & Interest	
Repayment amount:	Repayment amount:	
Frequency: <input type="checkbox"/> M <input type="checkbox"/> FN <input type="checkbox"/> W	Frequency: <input type="checkbox"/> M <input type="checkbox"/> FN <input type="checkbox"/> W	
Extra Repayments:	Extra Repayments:	
Frequency: <input type="checkbox"/> M <input type="checkbox"/> FN <input type="checkbox"/> W	Frequency: <input type="checkbox"/> M <input type="checkbox"/> FN <input type="checkbox"/> W	
Use Offset Acct: <input type="checkbox"/> Y <input type="checkbox"/> N	Use Offset Acct: <input type="checkbox"/> Y <input type="checkbox"/> N	
Your Preferences – Tick as appropriate		
<input type="checkbox"/> I would like to explore opportunities to reduce my loan/s as quickly as possible.		
<input type="checkbox"/> I prefer to stay with my current lender.		
<input type="checkbox"/> I am prepared to change lenders if the potential benefits and savings are clearly identified		
<input type="checkbox"/> I need to review my debt protection coverage.		

When completed Fax or Email to 1300 854 336 or  
[support@mortgagepartnersaustralia.com.au](mailto:support@mortgagepartnersaustralia.com.au)