

Please complete this form and return to admin@baysidemortgages.com.au.

Date Completed

Supplier	Best Contact Number
Loan purpose	Loan amount sought \$

Customer Information												
Personal	Applicant 1						Applicant 2					
Title: <i>(please select)</i>	Mr	Mrs	Miss	Ms	Dr	Other	Mr	Mrs	Miss	Ms	Dr	Other
First and middle names:												
Surname:												
Date of birth:												
Contact phone numbers:	Home:			Work:			Home:			Work:		
	Mobile:						Mobile:					
Email address:												
Current Residential Address												
Current address:												
	Suburb		State		Postcode		Suburb		State		Postcode	
Current status:	Owner	Renting	Boarding				Owner	Renting	Boarding			
	Living with parents		Owner with mortgage				Living with parents		Owner with mortgage			
How long have you been at this current address:	Date moved in						Date moved in					
Previous address: <i>(if at current address for less than 3 years)</i>												
	Suburb		State		Postcode		Suburb		State		Postcode	
How long were you at this address:	Date moved in			Date moved out			Date moved in			Date moved out		
Residency status:	Australian citizen			Permanent resident			Australian citizen			Permanent resident		
	Temporary resident			Visitor			Temporary resident			Visitor		
Marital status:	Married		Single		Divorced		Married		Single		Divorced	
	De Facto		Separated		Widowed		De Facto		Separated		Widowed	
Mother's maiden name:												
ID:	ID type:			Number:			ID type:			Number:		
	Issued by:			Expiry date:			Issued by:			Expiry date:		
Number of dependent children:												
Age / Date of birth of dependent children:												

	Applicant 1				Applicant 2				
Employment									
Current employment type:	Full-time Permanent Part-time Home duties	Contract Self-Employed	Casual Retired		Full-time Permanent Part-time Home duties	Contract Self-Employed	Casual Retired		
Current employer's name: <i>(in full)</i>									
Contact details: <i>(for verifying employment)</i>	Name: Phone Number:				Name: Phone Number:				
Current employer address:	Suburb State Postcode				Suburb State Postcode				
Current Occupation / Job title:									
Time with current employer:	Start date:				Start date:				
Income – gross annual salary: <i>(before tax)</i>	\$:				\$:				
Gross annual overtime/ penalties: <i>(before tax)</i>	\$:				\$:				
Other annual income – pensions, FTB: <i>(P.A. before tax)</i>	\$:				\$:				
Previous employer's full name: <i>(if current employment is less than 3 years)</i>									
Previous employment type:	Full-time Permanent Part-time Home duties	Contract Self-Employed	Casual Retired		Full-time Permanent Part-time Home duties	Contract Self-Employed	Casual Retired		
Previous employer's phone number:									
Previous Occupation/Job title:									
Time with previous employer:	Start date:		End date:		Start date:		End date:		
ABN: <i>(if self employed)</i>									
Director of a company:	No: Yes: <i>(if yes, complete the below section)</i>				No: Yes: <i>(if yes, complete the below section)</i>				
	Company / Trust 1				Company / Trust 2				
Company / Trust Name:									
Director(s) name:									
Trading address:	Suburb State Postcode				Suburb State Postcode				
Number of years registered:									
ACN:									
Assets									
Properties Owned	Property 1			Property 2			Property 3		
Address:	Suburb State Postcode		Suburb State Postcode		Suburb State Postcode		Suburb State Postcode		
Owner occupied:	No	Yes	No	Yes	No	Yes	No	Yes	
Value:	\$:		\$:		\$:		\$:		
In the name of:	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2	Applicant 1	Applicant 2	
Rental Income: Gross Weekly <i>(before any agent costs):</i>	\$:		\$:		\$:		\$:		

Assets (continued)													
Savings Account and Term Deposits		Account 1				Account 2				Account 3			
Financial institution:													
In the name of:		Applicant 1		Applicant 2		Applicant 1		Applicant 2		Applicant 1		Applicant 2	
Balance:		\$:				\$:				\$:			
Motor Vehicles		Vehicle 1				Vehicle 2				Vehicle 3			
Value:		\$:				\$:				\$:			
Make:													
Year built:													
In the name of:		Applicant 1		Applicant 2		Applicant 1		Applicant 2		Applicant 1		Applicant 2	
Superannuation		Applicant 1				Applicant 2							
Value:		\$:				\$:							
Household items													
Value: <i>Hint – what value are your home contents insured for?</i>		\$:				\$:							
Other Assets													
Asset Type (<i>caravan, boat, shares, etc.</i>)													
Value:		\$:				\$:				\$:			
Liabilities		Mortgage 1				Mortgage 2				Mortgage 3			
In the name of:		Applicant 1		Applicant 2		Applicant 1		Applicant 2		Applicant 1		Applicant 2	
Name of financial institution:													
Original loan amount:		\$:				\$:				\$:			
Outstanding balance:		\$:				\$:				\$:			
Minimum monthly repayment:		\$:				\$:				\$:			
Account number:													
Other Liabilities		Loan 1				Loan 2				Loan 3			
Loan type: (<i>Car / Personal / HECS / Other Loans</i>)													
In the name of:		Applicant 1		Applicant 2		Applicant 1		Applicant 2		Applicant 1		Applicant 2	
Name of financial institution:													
Original loan amount:		\$:				\$:				\$:			
Amount currently owing:		\$:				\$:				\$:			
Monthly repayment:		\$:				\$:				\$:			
Account number:													
Is loan being paid out?		Yes		No		Yes		No		Yes		No	
How:													
Credit Cards / Store Cards		Card 1				Card 2				Card 3			
In the name of:		Applicant 1		Applicant 2		Applicant 1		Applicant 2		Applicant 1		Applicant 2	
Name of financial institution:													
Credit limit:		\$:				\$:				\$:			
Amount currently owing:		\$:				\$:				\$:			
Card Type:		Visa	AMEX	Diners	Mastercard	Visa	AMEX	Diners	Mastercard	Visa	AMEX	Diners	Mastercard
		Other				Other				Other			

The following table is designed to assist in determining your average monthly living expenses, and it is important to complete it accurately.

Ongoing Customer Declared Living Expenses		
Expense Type	\$ Per Month	Notes
Owner Occupied Property Utilities: <i>Housing and property expenses on owner occupied property including rates, taxes, levies, body corporate and strata fees, repairs and maintenance, other household items and utilities (excluding telephone, internet and pay TV as they are categorised separately)</i>	\$:	
Investment Property Utilities: <i>Housing and property expenses on investment property including rates, taxes, levies, body corporate and strata fees, repairs and maintenance, insurance, other household items and utilities (excluding telephone, internet and pay TV as they are categorised separately)</i>	\$:	
Telephone, Internet, Pay TV: <i>Telephone accounts (home and mobile), internet, pay TV and media streaming subscriptions (such as Netflix and Spotify)</i>	\$:	
Groceries: <i>Typical supermarket shop for groceries including food and toiletries</i>	\$:	
Recreation and Entertainment: <i>Alcohol, tobacco, gambling, restaurants, membership fees and subscriptions, pet care, holidays</i>	\$:	
Clothing and Personal Care: <i>Clothing, footwear, cosmetics, personal care</i>	\$:	
Medical and Health: <i>Including doctor, dental, optical and pharmaceutical etc. (excluding health insurance which is categorised under insurance)</i>	\$:	
Transport: <i>Public transport, motor vehicle running costs including fuel, servicing, registration, parking and tolls (excluding motor vehicle insurance which is categorised under insurance)</i>	\$:	
Education: <i>Public and private education fees and associated costs (preschool, primary, secondary and tertiary) including books and uniforms etc.</i>	\$:	
Childcare: <i>Including nannies and court-ordered child maintenance</i>	\$:	
Insurance: <i>All insurance including health, home and contents, motor vehicle (CTP green slip and comprehensive), life, income protection</i>	\$:	
Other: <i>Including ongoing rent and any other unique items not covered in above categories (must be explained further)</i>	\$:	
Total Declared Ongoing Living Expenses	\$:	

Non-Ongoing Living Expenses (if applicable):
Provide details on any non-ongoing living expenses including non-ongoing rent

Additional Commentary:

This customer information form enables us to obtain a summary of your financial situation and does not represent an application for credit. Your privacy is important to us.