



First Mortgage Investments
 Customised Lending & Investments

First Mortgage Investments
 First Mortgage Investments Pty Ltd
 ABN 66 062 665 712
 Australian Credit Licence No. 388473
 First Mortgage Managed
 Investments Limited ABN 39 089 507 899
 Australian Financial Services Licence No. 227931
 Australian Credit Licence No. 227931

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Loan Application & Financial Information

The purpose of the Loan is:

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What are your financial objectives for seeking the Loan

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Personal Details – Person 1

<i>Title</i>	<i>Given Name(s)</i>	
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	
<i>Surname</i>		
<input style="width: 100%;" type="text"/>		
<i>Home phone number</i>		<i>Home fax number</i>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>Work phone number</i>		<i>Mobile number</i>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>Email address</i>		
<input style="width: 100%;" type="text"/>		
<i>Date of Birth</i>	<i>Gender</i>	<i>Marital Status</i>
<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>	<input type="checkbox"/> M <input type="checkbox"/> F	<input style="width: 40%;" type="text"/>
<i>Drivers Licence No.</i>		<i>State Issued</i>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>No. of Dependants</i>	<i>Age of Dependents</i>	
<input style="width: 20%;" type="text"/>	<input style="width: 80%;" type="text"/>	
<i>My current residential address is:</i>		
<input style="width: 100%;" type="text"/>		
<input style="width: 100%;" type="text"/>		
Postcode		
<i>Date moved there, month and year</i>		<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>My current residential status is:</i>		
<input type="checkbox"/> Home has mortgage	<input type="checkbox"/> Rent / Board	
<input type="checkbox"/> Own home	<input type="checkbox"/> Live with parents/relatives	
<i>Postal Address (leave blank if same as residential address)</i>		
<input style="width: 100%;" type="text"/>		
<input style="width: 100%;" type="text"/>		
Postcode		
<i>Have you ever been bankrupt or assigned your Estate?</i>		
<input type="checkbox"/> No <input type="checkbox"/> Yes – What year?		

Personal Details – Person 2

<i>Title</i>	<i>Given Name(s)</i>	
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	
<i>Surname</i>		
<input style="width: 100%;" type="text"/>		
<i>Home phone number</i>		<i>Home fax number</i>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>Work phone number</i>		<i>Mobile number</i>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>Email address</i>		
<input style="width: 100%;" type="text"/>		
<i>Date of Birth</i>	<i>Gender</i>	<i>Marital Status</i>
<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>	<input type="checkbox"/> M <input type="checkbox"/> F	<input style="width: 40%;" type="text"/>
<i>Drivers Licence No.</i>		<i>State Issued</i>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>No. of Dependants</i>	<i>Age of Dependents</i>	
<input style="width: 20%;" type="text"/>	<input style="width: 80%;" type="text"/>	
<i>My current residential address is:</i>		
<input style="width: 100%;" type="text"/>		
<input style="width: 100%;" type="text"/>		
Postcode		
<i>Date moved there, month and year</i>		<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>
<i>My current residential status is:</i>		
<input type="checkbox"/> Home has mortgage	<input type="checkbox"/> Rent / Board	
<input type="checkbox"/> Own home	<input type="checkbox"/> Live with parents/relatives	
<i>Postal Address (leave blank if same as residential address)</i>		
<input style="width: 100%;" type="text"/>		
<input style="width: 100%;" type="text"/>		
Postcode		
<i>Have you ever been bankrupt or assigned your Estate?</i>		
<input type="checkbox"/> No <input type="checkbox"/> Yes – What year?		

Authority for Employer/Accountant to Disclose Details

Full name of Person 1

Employment Details – Person 1

Give details of your primary job only. Attach details of additional jobs.

Job Title:

Employer's Name

Employer's Address

Postcode

Date started – month/year	/
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My employment is:

Full-time Part-time Temporary Other

Self employed? No Yes

Name of contact person at your employer e.g. Personnel or Payroll Manager

Contact Person's Phone Number

Contact Person's Email Address

Accountant's Details – Person 1

Accountant's name

(leave blank if you do not have an accountant)

Accountant's Address

Postcode

Accountant's Phone Number

Accountant's Email Address

Full name of Person 2

Employment Details – Person 2

Give details of your primary job only. Attach details of additional jobs.

Job Title:

Employer's Name

Employer's Address

Postcode

Date started – month/year	/
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My employment is:

Full-time Part-time Temporary Other

Self employed? No Yes

Name of contact person at your employer e.g. Personnel or Payroll Manager

Contact Person's Phone Number

Contact Person's Email Address

Accountant's Details – Person 2

Accountant's name

(leave blank if you do not have an accountant)

Accountant's Address

Postcode

Accountant's Phone Number

Accountant's Email Address

Declaration – Person 1

I authorise my employer and/or accountant to disclose any salary, employment or financial details to First Mortgage Investments to assist in the assessment of this application. I also acknowledge that First Mortgage Investments will provide a copy of this authority to my employer or accountant if they ask for details of First Mortgage Investments' authority to obtain that information, but no any other part of the credit application.

Signature	Date
<input type="text"/>	/ /

Declaration – Person 2

I authorise my employer and/or accountant to disclose any salary, employment or financial details to First Mortgage Investments to assist in the assessment of this application. I also acknowledge that First Mortgage Investments will provide a copy of this authority to my employer or accountant if they ask for details of First Mortgage Investments' authority to obtain that information, but no any other part of the credit application.

Signature	Date
<input type="text"/>	/ /

Solicitor's Details – Person 1**Solicitor's name***(leave blank if you do not have a solicitor)***Solicitor's Address**

Postcode

Solicitor's Phone Number**Solicitor's Email Address****Solicitor's Details – Person 2****Solicitor's name***(leave blank if you do not have a solicitor)***Solicitor's Address**

Postcode

Solicitor's Phone Number**Solicitor's Email Address****Nearest Relative Particulars (not living with you)****Name:****Relationship:****Address:****Telephone:****Nearest Relative Particulars (not living with you)****Name:****Relationship:****Address:****Telephone:****Current Commitments**

Mortgages / Account Number	Company (e.g. Bank, financier)	Monthly Payment	Current Balance	Limit
Credit Cards	Company (e.g. Bank, financier)	Monthly Payment	Current Balance	Limit
Personal Loans / Hire Purchases	Company (e.g. Bank, financier)	Monthly Payment	Current Balance	Limit

Monthly Expenses**Avg per Month**

Food & Groceries (eg fruit, meat, groceries, household items, take away)	\$
Housing & Property Expenses (excluding Mortgage Repayments) (eg water, electricity, gas, council rates, strata fees, land tax, agent fees, ongoing maintenance, repairs, gardening, pool services, cleaning services, investment property expenses)	\$
Communication (eg internet, pay tv, phone, media streaming subscriptions)	\$
Education (eg school/uni fees, books, materials, courses, higher education)	\$
Clothing and Personal Care (eg clothing, shoes, hair and beauty treatments, beauty and hygiene products)	\$
Transport and Auto (eg bus, train, ferry, car registration, petrol, tolls, repairs and maintenance)	\$
Medical, Health and Fitness (eg doctor, dentist, physiotherapy, medicines, eye care, glasses, gym membership)	\$
Insurance (eg car, home and contents, life, income protection, landlord, private health)	\$
Recreation, Travel and Entertainment (eg sport, boat, holidays, dining out, movies, electronic games, electronics, tobacco, alcohol, gambling)	\$
Children and Pets (eg day care, childcare, sports, music, tuition, nanny, pet expenses)	\$
Other Expenses and Purchases (eg expenses incurred for other adults within the household and expenses not covered elsewhere)	\$
TOTAL	\$

Financial Details – Person 1**GROSS ANNUAL INCOME****Employees** – Specify your current gross income

\$

Self-employed people – Specify gross annual income shown on:

Last Tax assessment notice Previous tax assessment notice

\$ \$

List any other income (e.g. Government Benefits)

From:	Annual Amount
	\$
	\$
	\$

Significant Changes in Financial Situation – Person 1

Do you expect any significant change to your financial situation over the next 2 years that would adversely impact your ability to meet your loan repayments?

 Yes No

If yes, what is the nature of the expected change (select one)?

- Temporary decrease in disposable income.
- Permanent decrease in disposable income.
- Anticipated large expenditure.

Please specify (one) nature of expected change such as maternity leave, loss of employment, reduced working hours, retirement, full time study, carer responsibilities, medical treatment or end of interest free period:

How will you continue to make payments (select one)?

- Using savings
- Securing additional income
- My application reflects these changes
- Reducing expenditure
- Sale of asset

Financial Details – Person 2**GROSS ANNUAL INCOME****Employees** – Specify your current gross income

\$

Self-employed people – Specify gross annual income shown on:

Last Tax assessment notice Previous tax assessment notice

\$ \$

List any other income (e.g. Government Benefits)

From:	Annual Amount
	\$
	\$
	\$

Significant Changes in Financial Situation – Person 2

Do you expect any significant change to your financial situation over the next 2 years that would adversely impact your ability to meet your loan repayments?

 Yes No

If yes, what is the nature of the expected change (select one)?

- Temporary decrease in disposable income.
- Permanent decrease in disposable income.
- Anticipated large expenditure.

Please specify (one) nature of expected change such as maternity leave, loss of employment, reduced working hours, retirement, full time study, carer responsibilities, medical treatment or end of interest free period:

How will you continue to make payments (select one)?

- Using savings
- Securing additional income
- My application reflects these changes
- Reducing expenditure
- Sale of asset

Each applicant, in relation to himself or herself and the loan, he or she has applied for confirms that the information contained in this Application is in all respects complete and accurate and is not, by omission or otherwise, misleading and acknowledges that First Mortgage Investments Pty Ltd and/or First Mortgage Managed Investments Limited, will rely on the information in this form, and the confirmations above, when making its decision whether to approve the application.

SIGN HERE**BY SIGNING BELOW** I/We acknowledge that I/we have read and understand each section of this Application Form.**Signature of Person 1**

✕

Date

/ / 20

Signature of Person 2

✕

Date

/ / 20