

Client Information Form

CLARITY

Completing this form will give us a clear picture of your financial situation and help us to give you home loan advice specific to your needs. It also helps ensure that, if you proceed to a loan application with us, it will be prepared as quickly as possible.

Applicant 1

Applicant 2

Title

First name

Middle name/s

Surname

Marital status

Date of Birth

DD/MM/YYYY

Dependents

Please list ages of all dependents

Current address

Date moved in

Current residential status

☐ Renting

☐ Own Home

☐ Live with parents

☐ Other

If renting: Current amount paid

\$

/week

Phone number

W

M

Email

W

H

Previous address

3 years residential history required

Previous residential status

☐ Renting

☐ Own Home

☐ Live with parents

☐ Other

From

To

Are you a tax resident of a country other than Australia?

☒ Yes

☐ No

If yes, which country?

Title

First name

Middle name/s

Surname

Marital status

Date of Birth

DD/MM/YYYY

Dependents

Please list ages of all dependents

Current address

Date moved in

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Are you a tax resident of a country other than Australia?

☐ Yes

☐ No

If yes, which country?

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Employment Details (3 years employment history required)

Employer

Phone number W

Address

Start date

Occupation

Employment type ☐ Full Time ☐ Part Time
☐ Casual ☐ Contract

Income
Gross income (before tax) \$ /year

Previous employer
If less than 3 years at current job

Phone number

Address

From

To

Employment type ☐ Full Time ☐ Part Time
☐ Casual ☐ Contract

Occupation

Other income
e.g. pensions, dividends, family allowance

\$ /year

Employment Details (3 years employment history required)

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\$ /year

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Assets (Complete for all people applying for the loan)

My property assets

Address 1		Rental income	Owner	Market Value
	☒ O/O ☐ INV	\$ /week	☐ 1 ☐ 2	\$
Address 2	☐ O/O ☐ INV	\$ /week	☐ 1 ☐ 2	\$
Address 3	☐ O/O ☐ INV	\$ /week	☐ 1 ☐ 2	\$

My cheque, savings, term deposit & other accounts

Name of Institution	Account type	Owner	Current balance
		☐ 1 ☐ 2	\$
		☐ 1 ☐ 2	\$
		☐ 1 ☐ 2	\$

My investments, including superannuation, shares, managed funds etc.

Name of Institution	Investment type	Owner	Current balance
		☐ 1 ☐ 2	\$
		☐ 1 ☐ 2	\$
		☐ 1 ☐ 2	\$

My other assets including home contents insured value, boats, tools of trade, business goodwill etc.

Asset description	Owner	Current balance
Home Contents	☐ 1 ☐ 2	\$
	☐ 1 ☐ 2	\$
	☐ 1 ☐ 2	\$

My motor vehicles

Make and model	Model Year	Owner	Market value
		☐ 1 ☐ 2	\$
		☐ 1 ☐ 2	\$

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Liabilities (Complete for all people applying for the loan)

My housing loans, overdrafts, business/company debts, or guarantees secured by mortgages.

Lender	Interest rate		Amount owing or limit
		%	\$
		%	\$
		%	\$

My credit cards, store cards, unsecured overdrafts, etc.

Lender	Credit limit	Amount owing
	\$	\$
	\$	\$
	\$	\$

My other loans and liabilities including personal loans, HECS/HELP, leases, child support, zip/afterpay, etc.

Lender	Credit type	Minimum monthly repayment	Borrower	Amount owing
		\$	☐ 1 ☐ 2	\$
		\$	☐ 1 ☐ 2	\$
		\$	☐ 1 ☐ 2	\$
		\$	☐ 1 ☐ 2	\$

My monthly living expenses

Utilities & Rates (Home)	\$		Recreation & Entertainment	\$		Education (Excluding HECS)	\$	
Utilities & Rates (Investment)	\$		Clothing & Personal Care	\$		Childcare	\$	
Phone, Internet & Pay TV	\$		Medical & Healthcare	\$		Insurance (Home, Personal & Car)	\$	
Food & Groceries	\$		Health Insurance	\$		Transport (Rego, Service, Petrol)	\$	
Other Please Describe:	\$		Other Please Describe:	\$		Other Please Describe:	\$	
Total						\$	0	

Other Comments

Include additional address/employment history if required