

TIFFEN & CO

CUSTOMER INFORMATION FORM

Date

PERSONAL DETAILS - APPLICANT 1

Title (eg Mr, Ms) Family name

First name Middle name(s)

Date of birth / / Gender M F

Driver's licence no. State issuer Expiry date

Email address

Mother's maiden name

Marital status
 Single Married Defacto
 Separated Divorced Widowed

No. & age of dependants, excluding spouse

My current residential address is:

 Postcode

Country (if not Australia)

Date moved there (specify month and year) /

My current residential status is:
 Home has mortgage Rent/Board
 Own home Live with parents/relatives

First home buyer? Yes No

Resident of (if not Australia)

Home phone number Mobile phone number

Postal address (leave blank if the same as your residential address)

 Postcode

Country (if not Australia)

Previous residential address (complete if you have been at your current address for less than 3 years – full 3 year history required)

 Postcode

Country (if not Australia)

Date moved there From / / To / /

Previous residential status is:
 Home has mortgage Rent/Board
 Own home Live with parents/relatives

PERSONAL DETAILS - APPLICANT 2

Title (eg Mr, Ms) Family name

First name Middle name(s)

Date of birth / / Gender M F

Driver's licence no. State issuer Expiry date

Email address

Mother's maiden name

Marital status
 Single Married Defacto
 Separated Divorced Widowed

No. & age of dependants, excluding spouse

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 Postcode

Country (if not Australia)

Date moved there (specify month and year) /

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Country (if not Australia)

Previous residential address (complete if you have been at your current address for less than 3 years – full 3 year history required)

 Postcode

Country (if not Australia)

Date moved there From / / To / /

Previous residential status is:
 Home has mortgage Rent/Board
 Own home Live with parents/relatives

NEAREST LIVING RELATIVE - APPLICANT 1

Relative name

Relationship

Contact number

Relative address

Postcode

EMPLOYER DETAILS - APPLICANT 1

Employment Details

Three years of employment history is required. Please provide details of all employers within this time frame.

My current employment:

Full-time Part-time Temporary

Casual Unemployed Recipient

Student Home duties Family business

Retired Other

Employer's business name

The title of my job is:

Self employed

Yes No

Contact name

Contact number

Time at current employment From / /

Employer's address

Postcode

Annual salary

\$

My previous employment:

Employer's business name

Job title

Self employed

Yes No

Contact name

Contact number

Time at previous employment

From / / To / /

Employer's address

Postcode

NEAREST LIVING RELATIVE - APPLICANT 2

Relative name

Relationship

Contact number

Relative address

Postcode

EMPLOYER DETAILS - APPLICANT 2

Employment Details

Three years of employment history is required. Please provide details of all employers within this time frame.

My current employment:

Full-time Part-time Temporary

Casual Unemployed Recipient

Student Home duties Family business

Retired Other

Employer's business name

The title of my job is:

Self employed

Yes No

Contact name

Contact number

Time at current employment From / /

Employer's address

Postcode

Annual salary

\$

My previous employment:

Employer's business name

Job title

Self employed

Yes No

Contact name

Contact number

Time at previous employment

From / / To / /

Employer's address

Postcode

MONTHLY EXPENSES - APPLICANT 1

MY MONTHLY EXPENSES*

(money you spend - do not include loan repayments)

I will be recording my expenses as:

Couple Individual

(If a couple, only fill out under one applicant name)

Rent/Board
(Which you will continue to pay after drawing this loan)

Child maintenance/Alimony \$

Clothing/Personal care \$

Reason for \$0.00 expense

Utilities/Rates/Related Costs \$

Reason for \$0.00 expense

Transport \$

Reason for \$0.00 expense

Child care (inc. nannies) \$

Reason for \$0.00 expense

Insurance \$

Reason for \$0.00 expense

Education \$

Reason for \$0.00 expense

Phone/Internet/Subscriptions \$

Reason for \$0.00 expense

Medical/health care \$

Reason for \$0.00 expense

Groceries \$

Reason for \$0.00 expense

MONTHLY EXPENSES - APPLICANT 2

MY MONTHLY EXPENSES*

(money you spend - do not include loan repayments)

I will be recording my expenses as:

Couple Individual

(If a couple, only fill out under one applicant name)

Rent/Board
(Which you will continue to pay after drawing this loan)

Child maintenance/Alimony \$

Clothing/Personal care \$

Reason for \$0.00 expense

Utilities/Rates/Related Costs \$

Reason for \$0.00 expense

Transport \$

Reason for \$0.00 expense

Child care (inc. nannies) \$

Reason for \$0.00 expense

Insurance \$

Reason for \$0.00 expense

Education \$

Reason for \$0.00 expense

Phone/Internet/Subscriptions \$

Reason for \$0.00 expense

Medical/health care \$

Reason for \$0.00 expense

Groceries \$

Reason for \$0.00 expense

MONTHLY EXPENSES - APPLICANT 1

MY MONTHLY EXPENSES*

(money you spend - do not include loan repayments)

Recreation/Entertainment \$

Reason for \$0.00 expense

Other \$

Details of expense

Do you foresee any changes to your income or expenses that will decrease your ability to meet your obligations under a loan contract in the reasonable foreseeable future (e.g. pending retirement, return to study, family circumstances)?

Yes No

If yes, please detail

MONTHLY EXPENSES - APPLICANT 2

MY MONTHLY EXPENSES*

(money you spend - do not include loan repayments)

Recreation/Entertainment \$

Reason for \$0.00 expense

Other \$

Details of expense

Do you foresee any changes to your income or expenses that will decrease your ability to meet your obligations under a loan contract in the reasonable foreseeable future (e.g. pending retirement, return to study, family circumstances)?

Yes No

If yes, please detail

ASSETS (WHAT I OWN) - ALL APPLICANTS

Complete for ALL people applying for the loan

List all assets individually or jointly owned - attach details if there is insufficient space

My cheque, savings, term deposit and other accounts are:

Name of institution and account

Owner: Applicant 1 Owner: Applicant 2

Account number and BSB

Current balance \$

Name of institution and account

Owner: Applicant 1 Owner: Applicant 2

Account number and BSB

Current balance \$

Name of institution and account

Owner: Applicant 1 Owner: Applicant 2

Account number and BSB

Current balance \$

Name of institution and account

Owner: Applicant 1 Owner: Applicant 2

Account number and BSB

Current balance \$

My motor vehicles are:

Make and model

Year built

Market value

\$

Owner

Make and model

Year built

Market value

\$

Owner

Superannuation:

Name of institution or self managed super fund

Value

\$

Owner

Name of institution or self managed super fund

Value

\$

Owner

My other assets, including household items and personal effects, cash, boats, tools of trade etc are:

Brief description of asset

Value

\$

Owner

Brief description of asset

Value

\$

Owner

Brief description of asset

Value

\$

Owner

Brief description of asset

Value

\$

Owner

ASSETS - FIRST PROPERTY

Detail of property to be mortgaged

If more than one security property, give details of the additional properties on a separate form.

Address of the property

 Postcode

Market value of property Property type, e.g. house, villa, land
\$

Type of title

Freehold Leasehold Strata Company Old system

Title particulars/number

if known Approximate land area
 m²/ha

Will you rent out the property?

No Yes – specify rental per month \$

Who will own the property?

Person 1 only Person 2 only Persons 1 & 2 jointly
 Other, specify

Restricted Assessment Valuation Details

Age of property yrs Approx. floor area m²

Main walls (e.g. bricks) Roof (e.g. tile)

No. bedrooms No. bathrooms

Ensuite Family rumpus Office
 Lounge room Dining room Inground pool
 Aboveground pool

Car accommodations/detached buildings

Garage Carport Other (specify)

Renovations/additions to the property?

N Y Year completed

Describe:

Valuation Access

Who can the Lender contact to arrange access to the property so that a valuation can be obtained?

Agent Seller Tenant Applicant

Name of contact

Daytime phone number Mobile phone number

ASSETS - SECOND PROPERTY

Detail of property to be mortgaged

If more than one security property, give details of the additional properties on a separate form.

Address of the property

 Postcode

Market value of property Property type, e.g. house, villa, land
\$

Type of title

Freehold Leasehold Strata Company Old system

Title particulars/number

if known Approximate land area
 m²/ha

Will you rent out the property?

No Yes – specify rental per month \$

Who will own the property?

Person 1 only Person 2 only Persons 1 & 2 jointly
 Other, specify

Restricted Assessment Valuation Details

Age of property yrs Approx. floor area m²

Main walls (e.g. bricks) Roof (e.g. tile)

No. bedrooms No. bathrooms

Ensuite Family rumpus Office
 Lounge room Dining room Inground pool
 Aboveground pool

Car accommodations/detached buildings

Garage Carport Other (specify)

Renovations/additions to the property?

N Y Year completed

Describe:

Valuation Access

Who can the Lender contact to arrange access to the property so that a valuation can be obtained?

Agent Seller Tenant Applicant

Name of contact

Daytime phone number Mobile phone number

LIABILITIES (WHAT I OWE) - ALL APPLICANTS

Complete for ALL people applying for the loan. List all liabilities individually or jointly liable - attach details if there is insufficient space

My housing loans, overdrafts and other loans (including those for my business/company) that are secured by mortgages are:

Address of security property	Name of lender	Account number	Monthly repayment	Interest rate
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %

Borrower	Amount to be repaid with this loan	Original loan amount	Current amount owing	Total remaining term
<input type="checkbox"/> Applicant 1	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Applicant 2				

Address of security property	Name of lender	Account number	Monthly repayment	Interest rate
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %

Borrower	Amount to be repaid with this loan	Original loan amount	Current amount owing	Total remaining term
<input type="checkbox"/> Applicant 1	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Applicant 2				

Address of security property	Name of lender	Account number	Monthly repayment	Interest rate
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %

Borrower	Amount to be repaid with this loan	Original loan amount	Current amount owing	Total remaining term
<input type="checkbox"/> Applicant 1	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Applicant 2				

Address of security property	Name of lender	Account number	Monthly repayment	Interest rate
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/> %

Borrower	Amount to be repaid with this loan	Original loan amount	Current amount owing	Total remaining term
<input type="checkbox"/> Applicant 1	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="checkbox"/> Applicant 2				

My credit cards, store cards, unsecured overdrafts etc are: (Include details of credit cards, store cards, etc even if you have a nil balance)

Type of card and number	Name of lender	Credit limit	Monthly repayment	Current balance	Debtor
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2

Type of card and number	Name of lender	Credit limit	Monthly repayment	Current balance	Borrower
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2

Type of card and number	Name of lender	Credit limit	Monthly repayment	Current balance	Borrower
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2

Type of card and number	Name of lender	Credit limit	Monthly repayment	Current balance	Borrower
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2

LIABILITIES (WHAT I OWE) - ALL APPLICANTS (continued).

Complete for ALL people applying for the loan. List all liabilities individually or jointly liable - attach details if there is insufficient space

My other loans, including personal loans, vehicle leases, hire purchase, commercial bill, contingent liabilities etc are:

Name of lender	Credit type e.g personal loan, lease, etc.	Credit limit	Monthly repayment	Current balance	Remaining term	Debtor
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2
Name of lender	Credit type e.g personal loan, lease, etc.	Credit limit	Monthly repayment	Current balance	Remaining term	Borrower
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2
Name of lender	Credit type e.g personal loan, lease, etc.	Credit limit	Monthly repayment	Current balance	Remaining term	Borrower
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2
Name of lender	Credit type e.g personal loan, lease, etc.	Credit limit	Monthly repayment	Current balance	Remaining term	Borrower
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2

My other liabilities, including provisional taxation, HECS, guarantees on loans/leases etc are:

Description of other liabilities	Credit limit	Monthly repayment	Current balance	Remaining term	Debtor
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2
Description of other liabilities	Credit limit	Monthly repayment	Current balance	Remaining term	Borrower
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2
Description of other liabilities	Credit limit	Monthly repayment	Current balance	Remaining term	Borrower
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2
Description of other liabilities	Credit limit	Monthly repayment	Current balance	Remaining term	Borrower
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2