

PREQUALIFY FORM

Date completed

/ /

Referred by

(Fax to 03 9700 7044 or email to matt.carra@bluekeyfinance.com.au)**CLIENT 1 NAME:** _____

Home number: _____ Mobile: _____

Email: _____

Home address: _____

Postcode: _____

Date moved in: _____ Date of birth: / /

What are the ages of your children still living with you? _____

Are you living with your parents in your own home **OR**

paying rent \$_____ per month

Do you have any defaults on your credit report or any history of bankruptcy?

If Yes, explain here: _____

CLIENT 2 NAME: _____

Home number: _____ Mobile: _____

Email: _____

Home address: _____

Postcode: _____

Date moved in: _____ Date of birth: / /

What are the ages of your children still living with you? _____

Are you living with your parents in your own home **OR**

paying rent \$_____ per month

Do you have any defaults on your credit report or any history of bankruptcy?

If Yes, explain here: _____

PAYG EMPLOYMENTFull Time Part Time (**Part time hours per week:** _____) Contract Casual (**Average hours per week:** _____) Home Duties Student Unemployed

CURRENT EMPLOYER: _____

Your occupation: _____

Employment start date: _____

GROSS Annual Income (excluding super) \$_____On your recent pay slip, what was your '**year to date**' (YTD) gross income:

\$_____ for period ending / / 20

(Broker use only) Annualised income = \$_____

On your recent **PAYG Payment Summary**, what was your gross income:

\$_____

Explain any **salary sacrificing** here: _____

If < 3 years with your current employer, write your employment history below:

(Include employer's name, job title, employment status, start & end dates):

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On your recent **PAYG Payment Summary**, what was your gross income:

\$_____

Explain any **salary sacrificing** here: _____

If < 3 years with your current employer, write your employment history below:

(Include employer's name, job title, employment status, start & end dates):

SELF EMPLOYEDSole Trader Partnership Company

What is your registered business name: _____

Industry you work in: _____

ABN _____ Registered / /

ACN _____ Registered for GST? YES or NO

Taxable Income for past 2 years:

\$_____ FY ending 30/6/20

\$_____ FY ending 30/6/20

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OTHER INCOME (excluding rental income)

Bonuses: _____ Commission: _____

Centrelink income: _____ per week / fortnight / month

_____ per week / fortnight / month

Child support income: _____ per week / fortnight / month

Company car allowance: _____ **OR** Fully maintained company car

Other income: _____

OTHER INCOME (excluding rental income)

Bonuses: _____ Commission: _____

Centrelink income: _____ per week / fortnight / month

_____ per week / fortnight / month

Child support income: _____

Company car allowance: _____ **OR** Fully maintained company car

Other income: _____

LOAN PURPOSE & FEATURES

Who is applying for the home loan? _____
 What are you seeking finance for? _____
 What features are important to you in a home loan? _____

COMPLETE THIS SECTION IF YOU ARE REFINANCING

Would you be looking for additional cash out or consolidation of other debts? YES or NO
 If YES, explain here including amount: _____

COMPLETE THIS SECTION IF YOU INTEND TO PURCHASE

What purchase price range are you looking at? \$ _____ (Please circle) → Owner Occupied or Investment
 Are you considering using equity in your current property instead of a cash deposit? YES or NO
 How much total deposit are you willing to contribute towards the purchase? \$ _____
 Has 5% of the expected purchase price been in your savings account/equity in your current property for more than 3 months? YES or NO
 How much of your deposit is gifted funds? N/A or \$ _____
 Are you considering building a property? YES or NO Are you considering buying an established property? YES or NO
 Are you eligible for the *First Home Owner's Grant*? YES / NO / UNSURE Have you owned a property before? YES or NO

YOUR CURRENT PROPERTIES & MORTGAGES

ASSET DETAILS	CURRENT HOME	INVESTMENT PROPERTY 1	INVESTMENT PROPERTY 2
Who is on the title?			
Suburb or Town			
Approximate value	\$	\$	\$
Which bank is your loan with?			
Rental Income per month		\$	\$
<i>Now provide details below for your mortgage</i>			
Loan 1 – Amount owing	\$	\$	\$
Loan 1 – Limit (If applicable)	\$	\$	\$
Loan 1 – Minimum monthly repayment	\$	\$	\$
Loan 1 – Interest rate type	Variable <input type="checkbox"/> or Fixed <input type="checkbox"/> P&I <input type="checkbox"/> or Interest Only <input type="checkbox"/>	Variable <input type="checkbox"/> or Fixed <input type="checkbox"/> P&I <input type="checkbox"/> or Interest Only <input type="checkbox"/>	Variable <input type="checkbox"/> or Fixed <input type="checkbox"/> P&I <input type="checkbox"/> or Interest Only <input type="checkbox"/>
Loan 1 – Current interest rate			
Loan 1 – Expiry date of fix interest rate			
<i>Only provide details below if there is a second split loan on your mortgage</i>			
Loan 2 – Amount owing	\$	\$	\$
Loan 2 – Limit (If applicable)	\$	\$	\$
Loan 2 – Minimum monthly repayment	\$	\$	\$
Loan 2 – Interest rate type	Variable <input type="checkbox"/> or Fixed <input type="checkbox"/> P&I <input type="checkbox"/> or Interest Only <input type="checkbox"/>	Variable <input type="checkbox"/> or Fixed <input type="checkbox"/> P&I <input type="checkbox"/> or Interest Only <input type="checkbox"/>	Variable <input type="checkbox"/> or Fixed <input type="checkbox"/> P&I <input type="checkbox"/> or Interest Only <input type="checkbox"/>
Loan 2 – Current interest rate			
Loan 2 – Expiry date of fix interest rate			

YOUR OTHER DEBTS

(e.g. Car loans, Child maintenance, Credit cards, , HECS or HELP debt, Interest free loans, Personal loans, Store cards, or Tax debt)

TYPE OF DEBT	CREDIT CARD	CREDIT CARD			
Account Holder:					
Which Bank:					
Limit <i>(For credit/store cards & line of credits)</i>					
Amount Owing					
Minimum monthly repayment:					

OTHER INFORMATION RELEVANT FOR YOUR FINANCE REQUEST

