

Union Fidelity New Proposal Application Form



Application for

Loan # *office use only*

1. Applicant Details

PLEASE USE BLOCK LETTERS TO COMPLETE THIS APPLICATION

	Borrower 1 / Director 1	Borrower 2 / Director 2
First/ Directors Name	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Company Name	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
# of Dependents	<input type="text"/>	<input type="text"/>
PAYG or Self Employed	<input type="text"/>	<input type="text"/>
Length of Employment	<input type="text"/>	<input type="text"/>
ABN #	<input type="text"/>	<input type="text"/>
How long has ABN # been held (Years)	<input type="text"/>	<input type="text"/>

2. Loan Details

(please tick one of the below)

(please tick one of the below)

Residential	<input type="checkbox"/>
Commercial	<input type="checkbox"/>
Rural	<input type="checkbox"/>
Current Lender	<input type="text"/>
	<input type="text"/>

Purchase	<input type="checkbox"/>
Refinance	<input type="checkbox"/>
Equity Takeout	<input type="checkbox"/>
Chattel/Inventory Finance	<input type="checkbox"/>
Current Rate	<input type="text"/>
	<input type="text"/>

3. Loan Requirements

Loan purpose/Breakdown	Value (\$)
	\$
Total Borrowings Required	\$

Is this loan to refinance an existing Consumer Credit Coded Loan

YES NO

Total Loan Amount Required

\$

Total Term Required

months

Total LVR Required

Type of Loan Required:

Principal & Interest

Interest Only

Full Verification

Low Verification

Can Tax Returns for the last 2 years be provided?

YES NO

4. Serviceability Details

Gross Annual Income (PAYG)	\$	Monthly Commitments (Excluding this loan)	\$
Net Annual Profit (Company)	\$	Total Rental Income Earned	\$
Self Employed – How much do the applicants draw in income from the company per year?	\$	Total \$ value of liabilities to remain in place (excluding this loan)	\$
		Other relevant income or liability information	\$

5. Security Property Details

Security Property 1

Security is owned	
Address of Security Property	
Purchase Price of Property	\$
Zoning	
Land Size	
Title Reference Details	
Description of security	
On settlement will the security property be owner occupied?	<input type="checkbox"/> YES <input type="checkbox"/> NO

6. Credit History

Payment Arrears - Unsecured Liabilities <i>Are there any defaults in the past 12 mths on any unsecured credit? If so, please detail as CC/PL/CR/ATO (credit card / personal loan / council rates / outstanding taxation)</i>			Payment Arrears - Secured Liabilities <i>Are there any defaults in the past 12 mths on any secured credit? If so, please detail as MTGE/CAR/GTEE (mortgage loan / lease, chattel or car / personal guarantee)</i>		
type of facility:	amount outstanding	# of pmts	type of facility:	amount outstanding	# of pmts
Payment Defaults - Unsecured Liabilities <i>Are there any defaults in the past 12 mths on any unsecured credit? If so, please detail as CC/PL/CR/ATO (credit card / personal loan / council rates / outstanding taxation)</i>			Payment Defaults - Secured Liabilities <i>Are there any defaults in the past 12 mths on any secured credit? If so, please detail as MTGE/CAR/GTEE (mortgage loan / lease, chattel or car / personal guarantee)</i>		
type of facility:	amount outstanding	# of pmts	type of facility:	amount outstanding	# of pmts
Court Judgments - Unsecured Liabilities <i>Are there any defaults in the past 12 mths on any unsecured credit? If so, please detail as CC/PL/CR/ATO (credit card / personal loan / council rates / outstanding taxation)</i>			Court Judgments - Secured Liabilities <i>Are there any defaults in the past 12 mths on any secured credit? If so, please detail as MTGE/CAR/GTEE (mortgage loan / lease, chattel or car / personal guarantee)</i>		
type of facility:	amount outstanding	# of pmts	type of facility:	amount outstanding	# of pmts

Personal Bankruptcy NEVER 6mths 12mths 18mths DISCHARGED

Administration / Liquidation / Receivership YES / NO *strike out as applicable*

If YES, provide details:

7. Notes on the loan

Purpose of the Loan?	
Clients Background? (Business/Occupation)	
Details on the property/ies	
Other information	

8. Assets and Liabilities

Asset		Value	Liabilities		Value		
Property Address 1			Lender		Monthly Payment	Current Rate	Current Debt
		\$			\$	%	\$
		\$			\$	%	\$
		\$			\$		\$
		\$			\$	%	\$
Deposits Paid		\$	Overdraft		\$	%	\$
Cash at Bank		\$	Personal loans				
Motor Vehicles		\$			\$	%	\$
Make/Model	Year	\$			\$	%	\$
		\$	Hire Purchase/Lease				
		\$	Lender		Equipment		
		\$				\$	\$
Personal effects		\$				\$	\$
Superannuation		\$	Credit/charge cards				
Other (give details)			Type	Credit Limit			
		\$		\$		\$	\$
		\$				\$	\$
		\$				\$	\$
		\$	Rent paid		\$		
		\$	Personal debts		\$		
			Other Liabilities		\$		
					\$		
					\$		
					\$		
Total Value of Assets		\$	Total Value of Liabilities		\$		\$