



Finance Information Form

Please fill out the following form. This will allow Charter Mortgage and Finance to accurately work out your maximum borrowing capacity for your home loan application.

Applicant 1 Information

Full Given Name

Date of Birth Gross Annual Income Length of Employment

Contact Number self employed? No Yes

Email Address

Australian Resident? Yes No Australian Citizen? Yes No

Applicant 2 Information

Full Given Name

Date of Birth Gross Annual Income Length of Employment

Contact Number self employed? No Yes

Email Address

Australian Resident? Yes No Australian Citizen? Yes No

ABN Held for _____ Years.

Joint Applicant Details

Address (Street Number and Name)

Suburb State Postcode

Previous Address (If at current home for less than 3 years)

Suburb State Postcode

Years lived at addresses Current _____ Prev _____

Relationship: Married Friends Family Defacto Other _____

We intend to borrow in: Joint Names Company / Trust Single Name _____

I/We wish to purchase a property for:

Owner Occupied Investment First Home Buyer

Dependents? No Yes Ages _____

Financial Position (Attach extra page/s if needed)

ASSETS

Item	Details	Value (\$)	Rental Income (PW)
Owner Occupied			
Investment Prop 1			
Investment Prop 2			
Savings			
Shares			
Other 1			
Other 2			
Total Assets \$			

LIABILITIES

Item	Details/Lender	Monthly Payments	Interest Rate	Balance Owning
Rent				
Owner Occupied				
Inv Home Loan 1				
Inv Home Loan 2				
Car Loan				
Personal Loan				
Credit Card 1	Card Limit			
Credit Card 2	Card Limit			
Other 1				
Other 2				
Other 3				
Total Liabilities \$				

Privacy Disclosure Statement and Consent

We are collecting personal information about you to provide you with our broking services.

The information is required to assist you in preparing the borrowing capacity and locate an appropriate lender. If your information is not provided we may not be able to find a loan for you.

Unless you tell us not to, we may use your information to provide you with offers or information of other goods or services we or a third party can provide you with.

We may disclose your information to other organizations to help us provide our services and arrange the loan. The types of organizations we may disclose your information to include lenders, mortgage insurers, other mortgage intermediaries, valuers, and other organizations which assist us (such as printers, mailing houses, lawyers, and accountants).

In addition, we may disclose your personal information to any other organization that may wish to, or has acquired, an interest in your loan, or in our business.

You can gain access to the information we hold about you by contacting us at the address below.

You agree that we may collect and use your personal information as specified above.

By signing this document you agree to its terms. It forms a legal contract between us. If you have any questions, ask before you sign.

Warning: The proposed loan arrangements will be based on the products available from our panel lenders and the information provided by you. If the information you provide is incomplete or inaccurate, before entering the borrowing capacity you should consider its appropriateness, having regard to your relevant personal circumstances and if necessary seek independent financial advice.

I/We hereby authorise Charter Mortgage and Finance to use my details as suggested above.

I/We acknowledge that in applying for the borrowing capacity, Charter Mortgage and Finance is relying on information provided by me.

Full Name (please print)

Full Name (please print)

Signature

Date

Signature

Date

Once the form is completed and signed, please attach any supporting documents and either fax, post or email to the contact information below:

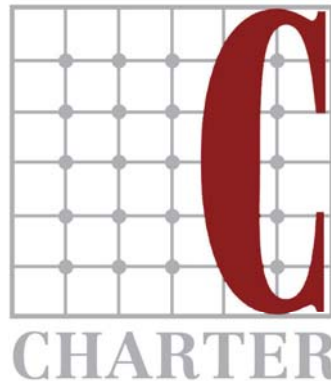
Post to:

Charter Mortgage and Finance
Suite 14 Lincoln House,
4 Ventnor Avenue
West Perth WA 6005

Fax to: (08) 9226 3225

Email to: mortgages@charterfin.com.au

Phone: (08) 9226 5123



ABN: 52 091 338 466 Finance Brokers Licence: 5138