

Requirements and Objectives

APPLICATION DETAILS

Application ID	<input type="text"/>		
Customer 1 Full Name	<input type="text"/>	Customer 2 Full Name	<input type="text"/>
Loan Amount Sought	<input type="text"/>	Loan Term	<input type="text"/>

WHY IS THE CUSTOMER SEEKING THIS LOAN?

Please list the primary reasons for seeking the credit

For example: purchase home, building, investment property, refinance, renovate, relocation, debt consolidation, study, holiday, car etc

1.
2.
3.

If refinancing or consolidating debts, please provide details of the debts that are being refinanced or consolidated and the resulting benefit to the customer. Please also advise whether refinancing is of a property used for investment purposes or an owner occupied home loan

1.
2.
3.

Costs and risks of refinancing or consolidating debts

For example: break costs, fees for credit assistance services, any special conditions etc

1.
2.
3.

How long is the customer looking to retain the property for?

< 5 years 5 - 10 years > 10 years

How will the property be used?

Owner Occupied Investment

Additional Notes

WHAT FEATURES WOULD THE CUSTOMER LIKE?

FEATURES	MUST HAVE	NICE TO HAVE	DON'T MIND	COMMENTS (INCLUDING REASONS FOR SEEKING)
Variable interest rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fixed interest rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Split account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
100% interest offset feature	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Interest only then principal and interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Principal and interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Redraw	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ability to make additional payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Construction - progressive drawdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Internet/online access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Visa debit card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other features sought (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Costs and risks of product feature/s being sought

For example: costs, fees for credit assistance services, any special conditions etc

If seeking an interest only loan, please provide reasons

For example: minimise repayments during the initial period of the loan, anticipated large expense items, flexibility, recommendation provided by independent financial advisor, maximise potential negative gearing benefits (based on independent financial and/or taxation advice), maximise cash flow, temporary reduction in income, debt separation

I confirm I have completed a Preliminary Assessment and that the above is a true and correct representation of the above customer's requirements and objectives and the product recommended is not unsuitable

Introducer
Signature

Date

Introducer Name