

# Home Loan Assessment Form



# BLUEHIVE

Bluehive Financial Services P/L  
Credit Licence: 388107

## Company / Trust Borrowers Only

v5.4

Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
ACN \_\_\_\_\_  
ABN \_\_\_\_\_  
Date of Incorporation \_\_\_\_\_

Trust Name \_\_\_\_\_  
Specified Beneficiaries \_\_\_\_\_  
*(List full names)* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Borrower 1 - Personal Details

Borrower Type \_\_\_\_\_  
*(eg. Applicant, Guarantor)*

Title \_\_\_\_\_

First Name \_\_\_\_\_

Middle Name \_\_\_\_\_

Surname \_\_\_\_\_

Date of Birth \_\_\_\_\_

Marital Status \_\_\_\_\_

No. Children < 18 yrs \_\_\_\_\_

Ages of Children < 18 yrs \_\_\_\_\_

Current Address \_\_\_\_\_  
*(street, suburb, postcode)*

Date Moved In \_\_\_\_\_

Living Arrangement \_\_\_\_\_  
*(eg. Own, Mortgage, Renting)*

Home Phone Number \_\_\_\_\_

Mobile Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

## Borrower 2 - Personal Details

Relationship to Borrower 1 \_\_\_\_\_

Borrower Type \_\_\_\_\_  
*(eg. Applicant, Guarantor)*

Title \_\_\_\_\_

First Name \_\_\_\_\_

Middle Name \_\_\_\_\_

Surname \_\_\_\_\_

Date of Birth \_\_\_\_\_

Marital Status \_\_\_\_\_

No. Children < 18 yrs \_\_\_\_\_

Ages of Children < 18 yrs \_\_\_\_\_

Current Address \_\_\_\_\_  
*(street, suburb, postcode)*

Date Moved In \_\_\_\_\_

Living Arrangement \_\_\_\_\_  
*(eg. Own, Mortgage, Renting)*

Home Phone Number \_\_\_\_\_

Mobile Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

**Borrower 1 - Personal Details**

Driver Licence Number \_\_\_\_\_  
Driver Licence Expiry \_\_\_\_\_  
Passport Number \_\_\_\_\_  
Passport Expiry \_\_\_\_\_  
Country of Citizenship \_\_\_\_\_

**Borrower 2 - Personal Details**

Driver Licence Number \_\_\_\_\_  
Driver Licence Expiry \_\_\_\_\_  
Passport Number \_\_\_\_\_  
Passport Expiry \_\_\_\_\_  
Country of Citizenship \_\_\_\_\_

**Previous Address 1**

*(Current < 3 yrs)* \_\_\_\_\_

Date Moved In \_\_\_\_\_

Living Arrangement \_\_\_\_\_  
*(eg. Own, Mortgage, Renting)*

**Previous Address 1**

*(Current < 3 yrs)* \_\_\_\_\_

Date Moved In \_\_\_\_\_

Living Arrangement \_\_\_\_\_  
*(eg. Own, Mortgage, Renting)*

**Previous Address 2**

*(Current + previous < 3 yrs)* \_\_\_\_\_

Date Moved In \_\_\_\_\_

Living Arrangement \_\_\_\_\_  
*(eg. Own, Mortgage, Renting)*

**Previous Address 2**

*(Current + previous < 3 yrs)* \_\_\_\_\_

Date Moved In \_\_\_\_\_

Living Arrangement \_\_\_\_\_  
*(eg. Own, Mortgage, Renting)*

Mother's Maiden Name \_\_\_\_\_

Nearest Friend / Relative \_\_\_\_\_

Address & Phone \_\_\_\_\_

Relationship \_\_\_\_\_

Mother's Maiden Name \_\_\_\_\_

Nearest Friend / Relative \_\_\_\_\_

Address & Phone \_\_\_\_\_

Relationship \_\_\_\_\_

**Borrower 1 - Credit History**

Please include a list of any defaults, court judgements or bankruptcy listed in the last 5 years

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Borrower 2 - Credit History**

Please include a list of any defaults, court judgements or bankruptcy listed in the last 5 years

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Borrower 1 - Employment Information

### Current Employment

Self Employed (Y/N)	Yes	No
Employer Name	_____	
ABN (if known)	_____	
Employer Address	_____ _____	
Phone Number	_____	
Contact Name	_____	
FT/PT/Casual	_____	
Job Title	_____	
Date Started	_____	
Annual Salary (ex super)	_____	
<i>Does this include (Y/N):</i>		
Bonus/Commission	Yes	No
Overtime/Allowances	Yes	No

## Borrower 2 - Employment Information

### Current Employment

Self Employed (Y/N)	Yes	No
Employer Name	_____	
ABN (if known)	_____	
Employer Address	_____ _____	
Phone Number	_____	
Contact Name	_____	
FT/PT/Casual	_____	
Job Title	_____	
Date Started	_____	
Annual Salary (ex super)	_____	
<i>Does this include (Y/N):</i>		
Bonus/Commission	Yes	No
Overtime/Allowances	Yes	No

### Previous Employment (current job < 3 years)

Employer Name	_____
Employer Address	_____ _____
Phone Number	_____
Contact Name	_____
Date Started	_____
Date Finished	_____

### Previous Employment (current job < 3 years)

Employer Name	_____
Employer Address	_____ _____
Phone Number	_____
Contact Name	_____
Date Started	_____
Date Finished	_____

### Previous Employment (current + previous job < 3 yrs)

Employer Name	_____
Employer Address	_____ _____
Phone Number	_____
Contact Name	_____
Date Started	_____
Date Finished	_____

### Previous Employment (current + previous job < 3 yrs)

Employer Name	_____
Employer Address	_____ _____
Phone Number	_____
Contact Name	_____
Date Started	_____
Date Finished	_____

## Property Purchase Details (property to be purchased or not yet settled)

Address (if known)	_____	Will you live here (Y/N)?	Yes	No
Property Type (eg. House, unit, land)	_____	<i>If rented:</i>		
Purchase Price	_____	Estimated weekly rent	_____	
Settlement Date	_____	Names on title	_____	

## Property You Already Own

### Property 1 Address

_____				
<i>If mortgaged:</i>		<i>If rented:</i>		
Lender	_____	Weekly Rental Income	_____	
Current Loan Balance	_____	Real Estate Agent	_____	
Total Loan Limit	_____	Contact Name	_____	
Monthly Repayment	_____	Contact Number	_____	
Interest Rate	_____	Names on title	_____	
Property Type (eg. House, unit, land)	_____		_____	
Estimated Value	_____	Security for this loan (Y/N)?	Yes	No

### Property 2 Address

_____				
<i>If mortgaged:</i>		<i>If rented:</i>		
Lender	_____	Weekly Rental Income	_____	
Current Loan Balance	_____	Real Estate Agent	_____	
Total Loan Limit	_____	Contact Name	_____	
Monthly Repayment	_____	Contact Number	_____	
Interest Rate	_____	Names on title	_____	
Property Type (eg. House, unit, land)	_____		_____	
Estimated Value	_____	Security for this loan (Y/N)?	Yes	No

## Non Property Assets

Cash / Investments	Bank / Institution	Account Number	Balance	Account Holder/s
Bank Account 1			\$	
Bank Account 2			\$	
Bank Account 3			\$	
Term Deposit			\$	
Shares			\$	
Investment Funds			\$	
Superannuation 1			\$	
Superannuation 2			\$	

Other Assets	Description	Value	Owner
Home Contents		\$	
Motor Vehicle 1		\$	
Motor Vehicle 2		\$	
		\$	
		\$	
		\$	
		\$	

## Non Property Liabilities

Loan Description	Lender	Balance	Monthly Payment	Borrower Name/s
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

Credit Card - Lender	Card Type (eg VISA)	Limit	Amount Owing	Account Holder
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

## Monthly Expenses (all expenses not including loans or credit card debt)

Description - please itemise monthly expenses according to the following categories

Utilities & Rates (owner occupied home)	\$ _____	Utilities & Rates (investment properties)	\$ _____
Telephone and Internet	\$ _____	Pay TV	\$ _____
Groceries	\$ _____	Entertainment	\$ _____
Clothing / Personal Care	\$ _____	Medical (not including health insurance)	\$ _____
Transport	\$ _____	Education	\$ _____
Childcare	\$ _____	Insurance (including health insurance)	\$ _____

## Loan Requirements

The purpose of this loan is \_\_\_\_\_

What is important to me in a home loan?

Variable interest rate (generally allows unlimited lump sum payments and redraw)

Fixed interest rate (in most cases repayments will not change during the fixed period)

Offset account (a savings account linked to the loan that can save interest)

Please arrange for someone to contact me by phone regarding relevant property insurance

(in most cases you will need to show evidence of the appropriate building insurance prior to settlement)

## Other Requirements

Please select any of the following services that we may be able to assist you with

Car loans (including trucks, boats, motorcycles, etc)

Equipment finance (including machinery, computer equipment, general office equipment)

Commercial finance (including property and business loans)

Self Managed Super Fund loans (for residential or commercial property purchases)

It is important that you consider appropriate personal insurances. As we are assisting you with increased debt we would like to understand what cover you have in place, and offer you a pathway to adequate insurances. Please complete details of current personal insurances including amount of cover, type and insurer.

Please include any other information that is relevant to this application

I/We confirm the information on this form is correct and will be relied upon by the broker to submit a loan application

Signed by Person 1: \_\_\_\_\_ Date: \_\_\_\_\_

Signed by Person 2: \_\_\_\_\_ Date: \_\_\_\_\_

## Broker to Complete this Page

### General Information

Conveyancer Details

(name, address, ph, email)

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Is client a First Home Buyer?

Yes

No

### Loan Details

**Lender**

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**Loan Split 1 - Amount**

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**Loan Split 1 - Product Name**

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Variable

Fixed

(If fixed, term in yrs)

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Interest Only

(If IO, term in yrs)

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**Loan Split 2 - Amount**

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**Loan Split 2 - Product Name**

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Variable

Fixed

(If fixed, term in yrs)

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Interest Only

(If IO, term in yrs)

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Offset Account

Credit Card to be included in application

### Notes to Lender