

**Section ONE - Please complete for all requests**

**Personal Details Person 1**

First Name

Middle

Last Name

Gender Male  Female

Date of Birth

No. of Dependents

Country of Citizenship

Marital Status Single  Married

**Residential Address**

Street address -

Suburb -

Town -  Post Code

Home Phone

Mobile Number

Email Address

How long have you lived there?

**Residence Type**

Own Home  Renting  Live with relatives

*Last address if you lived at the current address for less than 3 years*

Street address -

Suburb -

Town -

**Section TWO - Your Employment Details**

Full Time  Part Time  Self-Employed

Employer Name

Employer Address

**Occupation**

Number of Years in current Employment

*Last Employment if Current one is less than 3 Years*

IRD No.

**Personal Details Person 2**

First Name

Middle

Last Name

Gender Male  Female

Date of Birth

No. of Dependents

Country of Citizenship

Marital Status Single  Married

**Residential Address**

Street address -

Suburb -

Town -  Post Code

Home Phone

Mobile Number

Email Address

How long have you lived there?

**Residence Type**

Own Home  Renting  Live with relatives

*Last address if you lived at the current address for less than 3 years*

Street address

Suburb -

Town -

**Your Employment Details**

Full Time  Part Time  Self-Employed

Employer Name

Employer Address

**Occupation**

Number of Years in current Employment

*Last Employment if Current one is less than 3 Years*

IRD No.

# Mortgage Pundit www.mortgagepundit.co.nz.

## Section THREE - Snapshot of your Assets and Liabilities

| Assets                                 |    | Liabilities  |    |
|--|----|--|----|
| <b>Property Address</b>                |    | <b>Market Value</b>                                |    |
| Owner occupied                         | \$ | <b>Home / Business Loan - Provide Lenders name</b> |    |
| Invest-                                | \$ | Amount & interest rate                             | \$ |
| Invest-                                | \$ | Amount & interest rate                             | \$ |
| Invest-                                | \$ | Amount & interest rate                             | \$ |
| Invest-                                | \$ | Amount & interest rate                             | \$ |
| Invest-                                | \$ | Amount & interest rate                             | \$ |
| Invest-                                | \$ | Amount & interest rate                             | \$ |
| <b>Motor Vehicle</b>                   |    | <b>Car Loan / Personal Loan</b>                    |    |
| Make & model                           | \$ | Amount & interest rate                             | \$ |
| Make & model                           | \$ | Amount & interest rate                             | \$ |
| Make & model                           | \$ | Amount & interest rate                             | \$ |
| <b>Contents</b>                        |    | <b>Store Cards</b>                                 |    |
|  | \$ | Limit  | \$ |
|  | \$ | Limit  | \$ |
| <b>Bank deposit</b>                    |    | <b>Credit card</b>                                 |    |
| Amount                                 | \$ | Limit  | \$ |
| Amount                                 | \$ | Limit  | \$ |
| Amount                                 | \$ | Limit  | \$ |
| <b>Superannuation / Kiwisaver</b>      |    | <b>Hire Purchase</b>                               |    |
|  | \$ | Amount & interest rate                             | \$ |
|  | \$ | Amount & interest rate                             | \$ |
|  | \$ | Amount & interest rate                             | \$ |
| <b>Total</b>                           |    | <b>Total</b>                                       |    |
|  | \$ |  | \$ |
| <b>Monthly Income from all Sources</b> |    | <b>Monthly Financial Commitments</b>               |    |
| Income Person 1                        | \$ | Loan Repayment                                     | \$ |
| Income Person 2                        | \$ | Loan Repayment                                     | \$ |
| Income Person 3                        | \$ | Loan Repayment                                     | \$ |
| Other income                           | \$ | Loan Repayment                                     | \$ |
| Other income                           | \$ | Loan Repayment                                     | \$ |
| <b>Rental Incomes</b>                  |    | <b>Monthly Living Expense</b>                      |    |
| Rental income Gross per week           | \$ | Childcare  | \$ |
| Rental income Gross per week           | \$ | Sports   | \$ |
| Rental income Gross per week           | \$ | Superannuation                                     | \$ |
| Rental income Gross per week           | \$ | Rates  | \$ |
| Rental income Gross per week           | \$ | Vehicle (Fuel, WOF, Registration)                  | \$ |
| <b>Total Income</b>                    | \$ | Utilities (Internet,Electricity,Phone)             | \$ |
|  |    | Food   | \$ |
|  |    | Clothing   | \$ |
|  |    | Insurance - Life/Medical                           | \$ |
|  |    | Insurance - General                                | \$ |
|  |    | Other  | \$ |
|  |    | <b>Total</b>                                       | \$ |
| <b>Guarantor</b>                       |    |  |    |
| Are you guaranteeing any loans?        |    |  |    |
| If Yes, Please provide details:        |    |  |    |
|  |    |  |    |
|  |    |  |    |