

- Thank you for taking the time to complete our full Loan Application Form
- It should take you around 10-20 minutes to complete
- Fill out as much as you are able to for now, we can help you with the rest later on
- Please feel free to get in touch if you have any queries

Loan Application

PERSONAL DETAILS OF APPLICANT 1

Surname _____

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr

First Name _____

Middle Name _____

Date of Birth _____

Country of Birth _____

NZ Residency Held? ☐ Yes ☐ No

Marital Status ☐ Married ☐ Defacto ☐ Single

Sex ☐ Male ☐ Female

Smoker? ☐ Yes ☐ No

Age of Dependants
 ____ / ____ / ____

Current Residential Address

Street: _____ Suburb: _____

City: _____ Postcode: _____

Postal Address (if different from above)

Street: _____ Suburb: _____

City: _____ Postcode: _____

Time there Years Months

If less than 3 years what was your previous address

Street: _____ Suburb: _____

City: _____ Postcode: _____

Time there Years Months

Are you currently? ☐ Renting ☐ Boarding

☐ Living in own home ☐ Other

Home Phone _____ Work Phone _____

Mobile Phone _____

Email Home _____ Work _____

EMPLOYMENT

Main Source of Income ☐ Salary/Wages ☐ Self Employed

☐ Other

Occupation _____

Employer/Business Name _____

Type of Business _____

How Long ____ Years ____ Months

Gross Income \$ _____

If less than 3 years - prior to that:

____ Years

____ Months

____ Years

____ Months

PERSONAL DETAILS OF APPLICANT 2

Surname _____

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr

First Name _____

Middle Name _____

Date of Birth _____

Country of Birth _____

NZ Residency Held? ☐ Yes ☐ No

Marital Status ☐ Married ☐ Defacto ☐ Single

Sex ☐ Male ☐ Female

Smoker? ☐ Yes ☐ No

Age of Dependants
 ____ / ____ / ____

Current Residential Address

Street: _____ Suburb: _____

City: _____ Postcode: _____

Postal Address (if different from above)

Street: _____ Suburb: _____

City: _____ Postcode: _____

Time there Years Months

If less than 3 years what was your previous address

Street: _____ Suburb: _____

City: _____ Postcode: _____

Time there Years Months

Are you currently? ☐ Renting ☐ Boarding

☐ Living in own home ☐ Other

Home Phone _____ Work Phone _____

Mobile Phone _____

Email Home _____ Work _____

EMPLOYMENT

Main Source of Income ☐ Salary/Wages ☐ Self Employed

☐ Other

Occupation _____

Employer/Business Name _____

Type of Business _____

How Long ____ Years ____ Months

Gross Income \$ _____

If less than 3 years - prior to that:

____ Years

____ Months

____ Years

____ Months

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FUNDING DETAILS

Purchase Price	\$	<input style="width: 100%;" type="text"/>
Section Cost	\$	<input style="width: 100%;" type="text"/>
Building Cost	\$	<input style="width: 100%;" type="text"/>
Refinance Mortgage	\$	<input style="width: 100%;" type="text"/>
Repay H/Ps	\$	<input style="width: 100%;" type="text"/>
Repay C/C	\$	<input style="width: 100%;" type="text"/>
Other	\$	<input style="width: 100%;" type="text"/>
Costs/Fees	\$	<input style="width: 100%;" type="text"/>
Subtotal	\$	<input style="width: 100%;" type="text"/>
Less Cash (if applicable)	\$	<input style="width: 100%;" type="text"/>
Other Loans	\$	<input style="width: 100%;" type="text"/>
Other Funds (eg.gifts)	\$	<input style="width: 100%;" type="text"/>
Finance Required	\$	<input style="width: 100%;" type="text"/>
Existing Exposure	\$	<input style="width: 100%;" type="text"/>
LVR	Total Exposure	\$ <input style="width: 100%;" type="text"/>
Lenders Mortgage Insurance Premium \$ <input style="width: 100%;" type="text"/>		
Add to loan? <input type="checkbox"/> Yes <input type="checkbox"/> No		

SECURITY ☐ 1st Mortgage ☐ 2nd Mortgage ☐ New ☐ Existing

1. ADDRESS

Street: <input style="width: 90%;" type="text"/>	Suburb: <input style="width: 90%;" type="text"/>
City: <input style="width: 90%;" type="text"/>	Postcode: <input style="width: 90%;" type="text"/>
Current Ownership	
<input type="checkbox"/> Already owned <input type="checkbox"/> To be purchased	
Status	
<input type="checkbox"/> Existing developed property	
<input type="checkbox"/> Section, New house to be built	
Intention	
<input type="checkbox"/> Owner Occupied <input type="checkbox"/> Rental <input type="checkbox"/> Other	
Type of Property	
<input type="checkbox"/> Std Residential <input type="checkbox"/> Attached Unit <input type="checkbox"/> Apartment	
<input type="checkbox"/> Lifestyle (Area m2) <input type="checkbox"/> Farm/Orchard <input type="checkbox"/> Commercial	
Zoning	
<input type="checkbox"/> Residential <input type="checkbox"/> Rural Residential <input type="checkbox"/> Rural <input type="checkbox"/> Other	
Tenure	
<input type="checkbox"/> Freehold <input type="checkbox"/> Cross Lease <input type="checkbox"/> Unit/Strata Title <input type="checkbox"/> Leasehold	
Value (complete more than one, if applicable)	
<input type="checkbox"/> Purchase Price	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Total Project Cost (if building)	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Rateable Value	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Valuation by Reg. Valuer	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Estimated (if preliminary assessment)	\$ <input style="width: 100%;" type="text"/>
Legal Description <input style="width: 100%;" type="text"/>	
Further Properties <input type="checkbox"/> Refer attached	
Combined Security Value	
(For LVR Calculation) \$ <input style="width: 100%;" type="text"/>	

LOAN TYPE AND STRUCTURE

Borrowing Entity	Loan Type (see below)	Loan Term	Interest Only Term	Rate Type (see below)	Rate Term	Payment Frequency (see below)	Amount
1		Yrs	Yrs		Mths		\$
2		Yrs	Yrs		Mths		\$
3		Yrs	Yrs		Mths		\$
4		Yrs	Yrs		Mths		\$
5		Yrs	Yrs		Mths		\$

☐ Table

☐ Reducing

☐ Interest Only

☐ Flex i/Revolving

☐ Fixed

☐ Variable/Floating

☐ Capped

☐ Weekly

☐ Fortnightly

☐ Monthly

SOLICITORS DETAILS

Firm	Name of Solicitor
Address	
	Phone
Fax	Email

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MORTGAGE TAILORS
TAILORING HOME LOANS TO SUIT



021-521-998



09-272-3560



09-272-3561

Email: apply@mortgagetailors.co.nz

Loan Application

PROPOSED MONTHLY INCOME & EXPENDITURE

INCOME		Annual Gross	Monthly Net
Salary/Wage	1	\$ _____	\$ _____
	2	\$ _____	\$ _____
Business	1	\$ _____	\$ _____
	2	\$ _____	\$ _____
Benefits	1	\$ _____	\$ _____
	2	\$ _____	\$ _____
Interest/Dividends		\$ _____	\$ _____
Other		\$ _____	\$ _____
Rental (as below)			
Scaled @		\$ _____	\$ _____
Boarder/Flatmate			
\$ _____ per week @ _____ %		\$ _____	\$ _____
TOTAL INCOME		\$ _____	\$ _____

A

RENTAL INCOME	
1. Address	Per Week
Street: _____	<input type="checkbox"/> E <input type="checkbox"/> P \$ _____
Suburb: _____	
City: _____	Postcode: _____
2. Address	Per Week
Street: _____	<input type="checkbox"/> E <input type="checkbox"/> P \$ _____
Suburb: _____	
City: _____	Postcode: _____
3. Address	Per Week
Street: _____	<input type="checkbox"/> E <input type="checkbox"/> P \$ _____
Suburb: _____	
City: _____	Postcode: _____
4. Address	Per Week
Street: _____	<input type="checkbox"/> E <input type="checkbox"/> P \$ _____
Suburb: _____	
City: _____	Postcode: _____
5. Address	Per Week
Street: _____	<input type="checkbox"/> E <input type="checkbox"/> P \$ _____
Suburb: _____	
City: _____	Postcode: _____
TOTAL RENTAL INCOME PER WEEK	
	\$ _____

EXPENSES

Rental Property Mortgages	PROPOSED MONTHLY
\$ _____ @ _____ yrs	\$ _____
\$ _____ @ _____ yrs	\$ _____
\$ _____ @ _____ yrs	\$ _____
SUB TOTAL B \$ _____	
Other Mortgage Payments (including Rev. Credit)	
\$ _____ @ _____ yrs	\$ _____
\$ _____ @ _____ yrs	\$ _____
\$ _____ @ _____ yrs	\$ _____
\$ _____ @ _____ yrs	\$ _____
Student Loans	Balance \$ _____
Student Loans	Balance \$ _____
Hire Purchase	
Lender _____	\$ _____
Lender _____	\$ _____
Other Loans	
Lender _____	\$ _____
Lender _____	\$ _____
Credit/Charge Cards Limit(s)	\$ _____ \$ _____
Store Cards	Limit(s) \$ _____ \$ _____
Child Support/Child Care	\$ _____
Rent to pay (\$ _____ per week)	\$ _____
Compulsory Superannuation	\$ _____
SUB TOTAL C \$ _____	
SUB TOTAL D (B+C) \$ _____	
PLUS	
Income Protection Ins/MPI Allowance/Cost	\$ _____
Life Insurance Allowance/Cost	\$ _____
Contents Insurance	\$ _____
Dwelling Insurance	\$ _____
Dwelling Rates (incl. water rates)	\$ _____
Medical Insurance	\$ _____
Motor Vehicle Insurance	\$ _____
Motor Vehicle Running & Reg.	\$ _____
Power/Telephone/Gas	\$ _____
Voluntary Superannuation	\$ _____
Food/Clothing/General	\$ _____
SUB TOTAL E \$ _____	
TOTAL MONTHLY EXPENSES (D+E) \$ _____	
NET MONTHLY INCOME (A) \$ _____	
NET MONTHLY SURPLUS \$ _____	

B

C

D

E

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STATEMENT OF ASSETS AND LIABILITIES (AT DATE OF APPLICATION)

ASSETS (approximately)

Main Bank/Branch

Money @ Bank/Other 1 _____ \$ _____

2 _____ \$ _____

3 _____ \$ _____

Property

1. _____ \$ _____

2. _____ \$ _____

3. _____ \$ _____

4. _____ \$ _____

5. _____ \$ _____

Shares _____ \$ _____

Vehicles 1 _____ \$ _____

2 _____ \$ _____

3 _____ \$ _____

Superannuation 1 _____ (SV) \$ _____

2 _____ (SV) \$ _____

Life Insurance 1 _____ \$ _____ (SV) \$ _____

2 _____ \$ _____ (SV) \$ _____

3 _____ \$ _____ (SV) \$ _____

Business Value(net) _____ \$ _____

Boat/Caravan _____ \$ _____

Other 1 _____ \$ _____

2 _____ \$ _____

3 _____ \$ _____

Furniture Et Personal Effects _____ \$ _____

TOTAL ASSETS _____ \$ _____

LIABILITIES (approximately)

Overdraft Limit \$ _____

Bank _____ \$ _____

Mortgages 1 Bank _____ \$ _____

2 Bank _____ \$ _____

3 Bank _____ \$ _____

4 Bank _____ \$ _____

5 Bank _____ \$ _____

Personal Loan 1 From _____ \$ _____

2 From _____ \$ _____

Hire Purchase 1 From _____ \$ _____

2 From _____ \$ _____

Credit/Store/Charge Cards

Limit \$ _____ \$ _____

From _____ ☐

Limit \$ _____ \$ _____

From _____ ☐

Limit \$ _____ \$ _____

From _____ ☐

Student Loans _____ \$ _____ \$ _____

Other Liabilities _____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

TOTAL LIABILITIES _____ \$ _____

NET SURPLUS _____ \$ _____

TOTAL (Per Total Assets) _____ \$ _____

Are you guaranteeing a loan for any other persons. ☐ Yes (If yes provide details) ☐ No

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SECURITY

☐ 1st Mortgage ☐ 2nd Mortgage ☐ New ☐ Existing

Address: 2

Street: Suburb:

City: Postcode:

Current Ownership

☐ Already owned ☐ To be purchased

Status

☐ Existing developed property ☐ Section, New House to be built

Intention

☐ Owner Occupied ☐ Rental ☐ Other

Type of Property

☐ Std Residential ☐ Attached Unit ☐ Apartment ☐ Lifestyle
☐ Farm/Orchard ☐ Commercial (*Area M²)

Zoning

☐ Residential ☐ Rural Residential ☐ Rural
☐ Other (Note)

Tenure:

☐ Freehold ☐ Cross Lease ☐ Unit/Strata Title ☐ Leasehold

Value: (complete more than one, if applicable) Value Used

☐ Purchase Price \$ \$
☐ Total Project Cost (if building) \$ \$
☐ Rateable Value \$ \$
☐ Valuation by Reg. Valuer \$ \$
☐ Estimated (if preliminary assessment) \$ \$

Legal Description

☐ 1st Mortgage ☐ 2nd Mortgage ☐ New ☐ Existing

Address: 3

Street: Suburb:

City: Postcode:

Current Ownership

☐ Already owned ☐ To be purchased

Status

☐ Existing developed property ☐ Section, New House to be built

Intention

☐ Owner Occupied ☐ Rental ☐ Other

Type of Property

☐ Std Residential ☐ Attached Unit ☐ Apartment ☐ Lifestyle
☐ Farm/Orchard ☐ Commercial (*Area M²)

Zoning

☐ Residential ☐ Rural Residential ☐ Rural
☐ Other (Note)

Tenure:

☐ Freehold ☐ Cross Lease ☐ Unit/Strata Title ☐ Leasehold

Value: (complete more than one, if applicable) Value Used

☐ Purchase Price \$ \$
☐ Total Project Cost (if building) \$ \$
☐ Rateable Value \$ \$
☐ Valuation by Reg. Valuer \$ \$
☐ Estimated (if preliminary assessment) \$ \$

Legal Description

☐ 1st Mortgage ☐ 2nd Mortgage ☐ New ☐ Existing

Address: 4

Street: Suburb:

City: Postcode:

Current Ownership

☐ Already owned ☐ To be purchased

Status

☐ Existing developed property ☐ Section, New House to be built

Intention

☐ Owner Occupied ☐ Rental ☐ Other

Type of Property

☐ Std Residential ☐ Attached Unit ☐ Apartment ☐ Lifestyle
☐ Farm/Orchard ☐ Commercial (*Area M²)

Zoning

☐ Residential ☐ Rural Residential ☐ Rural
☐ Other (Note)

Tenure:

☐ Freehold ☐ Cross Lease ☐ Unit/Strata Title ☐ Leasehold

Value: (complete more than one, if applicable) Value Used

☐ Purchase Price \$ \$
☐ Total Project Cost (if building) \$ \$
☐ Rateable Value \$ \$
☐ Valuation by Reg. Valuer \$ \$
☐ Estimated (if preliminary assessment) \$ \$

Legal Description

☐ 1st Mortgage ☐ 2nd Mortgage ☐ New ☐ Existing

Address: 5

Street: Suburb:

City: Postcode:

Current Ownership

☐ Already owned ☐ To be purchased

Status

☐ Existing developed property ☐ Section, New House to be built

Intention

☐ Owner Occupied ☐ Rental ☐ Other

Type of Property

☐ Std Residential ☐ Attached Unit ☐ Apartment ☐ Lifestyle
☐ Farm/Orchard ☐ Commercial (*Area M²)

Zoning

☐ Residential ☐ Rural Residential ☐ Rural
☐ Other (Note)

Tenure:

☐ Freehold ☐ Cross Lease ☐ Unit/Strata Title ☐ Leasehold

Value: (complete more than one, if applicable) Value Used

☐ Purchase Price \$ \$
☐ Total Project Cost (if building) \$ \$
☐ Rateable Value \$ \$
☐ Valuation by Reg. Valuer \$ \$
☐ Estimated (if preliminary assessment) \$ \$

Legal Description