

## FACT FIND Lending Application PART 1 OF 2

Existing Main Bank: \_\_\_\_\_  
 Existing Bank Number: \_\_\_\_\_  
 Other Banks: \_\_\_\_\_  
 Title: Mr/Mrs/Ms/Miss/Dr/Other \_\_\_\_\_  
 First Name (s) \_\_\_\_\_  
 Last Name \_\_\_\_\_  
 Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
 Number of dependent's \_\_\_\_\_ Ages \_\_\_\_\_

Are you an NZ Citizen or permanent NZ resident?  Yes  No  
 If no please supply your work permit expiry date  
 \_\_\_\_/\_\_\_\_/\_\_\_\_\_

Contact Details;  
 Home # ( ) \_\_\_\_\_  
 Business # ( ) \_\_\_\_\_  
 Fax ( ) \_\_\_\_\_  
 Mobile # ( ) \_\_\_\_\_  
 Email \_\_\_\_\_

Current Residential Address;  
 # and Street \_\_\_\_\_  
 Suburb \_\_\_\_\_  
 City \_\_\_\_\_  
 Post Code \_\_\_\_\_  
 Time there (Years\_\_\_\_\_/ Months\_\_\_\_\_) \_\_\_\_\_

- Own Home (With home loan)  Own Home (freehold)  
 Renting  Boarding  With Parents  Caravan  
 Other .....

Previous address if less than three years;  
 # and Street \_\_\_\_\_  
 Suburb \_\_\_\_\_  
 City \_\_\_\_\_  
 Post Code \_\_\_\_\_  
 Time there (Years / Months ) \_\_\_\_\_

Your Postal Address – if different from residential  
 # and Street \_\_\_\_\_  
 Suburb \_\_\_\_\_  
 City \_\_\_\_\_  
 Post Code \_\_\_\_\_

Employer's Name \_\_\_\_\_  
 Location of Employment \_\_\_\_\_  
 Current Occupation \_\_\_\_\_

Full-time  Part-time  Self-Employed  
 Time there (Years / Months ) \_\_\_\_\_  
 Previous occupation/employer if less than three years  
 Employer's Name \_\_\_\_\_  
 Location of Employment \_\_\_\_\_

Existing Main Bank: \_\_\_\_\_  
 Existing Bank Number: \_\_\_\_\_  
 Other Banks: \_\_\_\_\_  
 Title: Mr/Mrs/Ms/Miss/Dr/Other \_\_\_\_\_  
 First Name (s) \_\_\_\_\_  
 Last Name \_\_\_\_\_  
 Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
 Number of Dependent's \_\_\_\_\_ Ages \_\_\_\_\_

Are you an NZ Citizen or permanent NZ resident?  Yes  No  
 If no please supply your work permit expiry date  
 \_\_\_\_/\_\_\_\_/\_\_\_\_\_

Contact Details;  
 Home # ( ) \_\_\_\_\_  
 Business # ( ) \_\_\_\_\_  
 Fax ( ) \_\_\_\_\_  
 Mobile # ( ) \_\_\_\_\_  
 Email \_\_\_\_\_

Current Residential Address;  
 # and Street \_\_\_\_\_  
 Suburb \_\_\_\_\_  
 City \_\_\_\_\_  
 Post Code \_\_\_\_\_  
 Time there (Years\_\_\_\_\_/ Months\_\_\_\_\_) \_\_\_\_\_

- Own Home (With home loan)  Own Home (freehold)  
 Renting  Boarding  With Parents  Caravan  
 Other .....

Previous address if less than three years;  
 # and Street \_\_\_\_\_  
 Suburb \_\_\_\_\_  
 City \_\_\_\_\_  
 Post Code \_\_\_\_\_  
 Time there (Years / Months ) \_\_\_\_\_

Your Postal Address – if different from residential  
 # and Street \_\_\_\_\_  
 Suburb \_\_\_\_\_  
 City \_\_\_\_\_  
 Post Code \_\_\_\_\_

Employer's Name \_\_\_\_\_  
 Location of Employment \_\_\_\_\_  
 Current Occupation \_\_\_\_\_

Full-time  Part-time  Self-Employed  
 Time there (Years / Months ) \_\_\_\_\_  
 Previous occupation/employer if less than three years  
 Employer's Name \_\_\_\_\_  
 Location of Employment \_\_\_\_\_

## FACT FIND Lending Application PART 2 OF 2

Are you/we wanting further information with Insurance, both personal and Mortgage protection? Yes/No

Are you/we First Time Home Buyer/s seeking approval with Lenders associated with Kainga Ora? Yes/No

Lending Amount required \$ \_\_\_\_\_

Purpose for Lending \_\_\_\_\_

### CURRENT STATEMENT OF FINANCIAL POSITION;

#### Liabilities

	<i>Institution</i>	<i>Limit</i>	<i>Amount Owing</i>
Bank Overdraft	_____	\$	\$
Bank Overdraft	_____	\$	\$

Credit Card	\$	\$
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*Paid in full each month*  Yes  No

Credit Card	\$	\$
-------------	----	----

*Paid in full each month*  Yes  No

Credit Card	\$	\$
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*Paid in full each month*  Yes  No

Store Card	\$	\$
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*Paid in full each month*  Yes  No

Store Card	\$	\$
------------	----	----

*Paid in full each month*  Yes  No

Store Card	\$	\$
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*Paid in full each month*  Yes  No

	<i>Institution</i>	<i>Expiry Date</i>	<i>Amount Owing</i>
Hire Purchase	_____	_____	\$

*Purpose:* \_\_\_\_\_

Hire Purchase	\$
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*Purpose:* \_\_\_\_\_

Personal Loan	\$
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*Purpose:* \_\_\_\_\_

Personal Loan	\$
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*Purpose:* \_\_\_\_\_

Other Loan	\$
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*Purpose:* \_\_\_\_\_

Family Loan	\$
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*Purpose:* \_\_\_\_\_

Home Loans;

	<i>Institution</i>	<i>Fixed/Floating/Limit</i>	<i>Amount Owing</i>
Home Loan	_____	_____	\$

Home Loan	\$
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Revolving Credit	\$	\$
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Other Finance;	\$
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Student Loan	\$
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#### Assets

	<i>Institution</i>	\$
Bank Deposit	_____	\$
Bank Deposit	_____	\$
Bank Deposit	_____	\$

#### Motor Vehicles

<i>Make</i>	<i>Model</i>	<i>Year</i>	
_____	_____	_____	\$
_____	_____	_____	\$
_____	_____	_____	\$
_____	_____	_____	\$
_____	_____	_____	\$

#### Real Estate/Property

<i>Address</i>	<i>Approx. Market Value</i>
_____	\$

*Notes/Insurance info:* \_\_\_\_\_  
\$

*Notes/Insurance info:* \_\_\_\_\_  
\$

*Notes/Insurance info:* \_\_\_\_\_  
\$

*Notes/Insurance info:* \_\_\_\_\_  
\$

	<i>Institution</i>	\$
Superannuation	_____	\$
	_____	\$

	<i>Institution</i>	\$
Bonds and Shares	_____	\$
	_____	\$

#### Other investments (e.g. value items such as boats, antiques caravans)

<i>Item</i>	<i>Value</i>
_____	\$
_____	\$

Total Assets	\$
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Less Total Liabilities	\$
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Surplus/Deficit	\$
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Notes on reverse.