

PERFORMANCE MORTGAGES

ABN: 16 607 074 997

AUSTRALIAN CREDIT LICENCE

NO: 394490



WELCOME

Thank you for your loan enquiry.
The following iGuide helps us to collect important information needed to fully understand your situation and allow us to make recommendations that suit you.

ABOUT

Performance Mortgages is a boutique Mortgage Advisory Firm established in 2007. We are passionate about educating our clients and finding the best finance structure for their property and business dealings.

Home Loans Investment Loans
Construction Loans
Equipment Finance
Business Finance Insurance
Commercial Loans
Deposit Bonds

iGuide

Borrower's Personal Details	Borrower 1	Borrower 2
Surname		
Christian Names		
Address		
Previous Address(if <3yrs at current)		
Housing Status (rent, with parents...)		
Home Ph		
Work Ph		
Mob Ph		
Email		
Age of Dependents		
Drivers Licence No./Expiry Date		
Employer/ Role & Status		
Employer's Address		
Employed Since		
Previous Employment (if < 3yrs)		
Previous Employer Address		
Previous Employ Suburb/PCode		
Date of Birth		
Mother's Maiden Name		
Please provide an explanation of what you require the funding for. Provide as much detail as possible, including any features you request:		
Is there anything that may change in the next 12 months that will affect your ability to repay a loan? <input type="checkbox"/> No If Yes, please provide details:		

LOAN PREFERENCES

Do you have any preferences to the lender?	
Which lender/s do you have accounts with?	
Do you have preferences to the loan product?	
Are you aware of how an offset account works?	
Do you have a preference for : i) Principle & Interest ii) Interest Only iii) Fixed Interest Rate	
Other Preferences/Loan Features?	

ASSETS/LIABILITY DETAILS

INCOME	Borrower 1	Borrower 2
Gross Annual Income		
Net Monthly Income		
Type: PAYG or Self Employed		
Other Income-Specify		
	Per Month Below	Per Month Below
LIABILITIES- continuing		
Home Loan		
Credit Card Limits-Combined		
Car Loans		
Other		
Other		
Other		
ASSETS		
Property 1		
Property 2		
Savings		
Motor Vehicles- Yr/Make/Model/Value		
Superannuation		
Other- contents etc		
Other		
Other		
Notes- Please explain in words anything you might need to clarify:		
Have you had any previous credit issues that might affect any application for credit (bankruptcy, legal actions against etc ?)		

PROTECTING YOUR FAMILY AND ASSETS

[Please give serious thought to the following questions, you never know what is around the corner].

Does the borrower/s have any have any insurance to protect their lifestyle Yes

If Yes, please describe.....

If No, how would the borrower/s meet financial needs if temporarily or permanently unable to earn an income through sickness or illness, permanent disability or death?.....
.....

Would the borrower like to be contacted regarding insurance to cover these circumstances? No

Do you have home and contents insurance for existing or about to purchase property?
Yes No

Can we obtain a no obligation quote for you for any property you nominate?
 Not at this stage – will call when interested.

If Yes, please specify the address of those property/s below

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VERIFICATION DOCUMENTS

The following are common documents required by lenders. You can start to compile the relevant documents to expediate your application. We will advise on any additional needs.

PAYG Borrowers

- Recent Payslips (2)**
or
- Letter of Employment on business letterhead showing (gross salary, length of services, status of employment and position).**

Self Employed

- Tax Returns (2), both business and personal**
- BAS Statements**
- Profit and Loss Statements**

Savings

- Evidence of funds to complete your purchase, with at least one statement an original statement showing names, lender ABN, account numbers.**

Refinancing

- 6 most recent months lender statements, with at least one original statement showing names, lender ABN, account numbers.**
- Rates notice.**

**Thank you for your efforts in compiling this information.
Mark Salmon.**