

PERSONAL DETAILS OF APPLICANT 1

Surname _____

Mr Mrs Ms Miss Dr

First Name(s) _____

Date of Birth / /

Country of Birth _____

NZ Residency Held? Yes No

Marital Status Married Defacto Single

Sex Male Female

Age of Dependants _____

Current Residential Address _____

Postal Address (if different from above) _____

Time there _____ Years _____ Months

If less than 3 years what was your previous address

Are you currently? Renting Boarding
 Living in own home Other

Home Phone _____

Mobile Phone _____

Work Phone _____

Email _____

EMPLOYMENT

Main Source of Income Salary/Wages Self Employed
 Other

Note _____

Occupation _____

Employer/Business Name _____

Type of Business _____

How Long _____ Years _____ Months

If less than 3 years - prior to that:

_____ Years _____ Months

_____ Years _____ Months

_____ Years _____ Months

PERSONAL DETAILS OF APPLICANT 2

Surname _____

Mr Mrs Ms Miss Dr

First Name(s) _____

Date of Birth / /

Country of Birth _____

NZ Residency Held? Yes No

Marital Status Married Defacto Single

Sex Male Female

Age of Dependants _____

Current Residential Address _____

Postal Address (if different from above) _____

Time there _____ Years _____ Months

If less than 3 years what was your previous address

Are you currently? Renting Boarding
 Living in own home Other

Home Phone _____

Mobile Phone _____

Work Phone _____

Email _____

EMPLOYMENT

Main Source of Income Salary/Wages Self Employed
 Other

Note _____

Occupation _____

Employer/Business Name _____

Type of Business _____

How Long _____ Years _____ Months

If less than 3 years - prior to that:

_____ Years _____ Months

_____ Years _____ Months

_____ Years _____ Months



STATEMENT OF ASSETS & 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. _____ K(SV) \$ _____

2. _____ K(SV) \$ _____

3. _____ K(SV) \$ _____

BUSINESS VALUE (net) _____ \$ _____

BOAT/CARAVAN _____ \$ _____

OTHER

1. _____ \$ _____

2. _____ \$ _____

3. _____ \$ _____

FURNITURE & PERSONAL EFFECTS _____ \$ _____

TOTAL ASSETS \$ _____

LIABILITIES (approximately)

OVERDRAFTS

1. Limit \$ _____ \$ _____

Bank _____

MORTGAGES

1. Bank _____ \$ _____

2. Bank _____ \$ _____

3. Bank _____ \$ _____

4. Bank _____ \$ _____

5. Bank _____ \$ _____

PERSONAL LOANS

1. From _____ \$ _____

2. From _____ \$ _____

3. From _____ \$ _____

HIRE PURCHASES

1. From _____ \$ _____

2. From _____ \$ _____

3. From _____ \$ _____

CREDIT/STORE/CHARGE CARDS

1. Limit \$ _____ \$ _____

From _____

2. Limit \$ _____ \$ _____

From _____

3. Limit \$ _____ \$ _____

From _____

STUDENT LOANS _____ \$ _____

OTHER LIABILITIES

1. _____ \$ _____

2. _____ \$ _____

3. _____ \$ _____

TOTAL LIABILITIES \$ _____

NET SURPLUS \$ _____

Are you guaranteeing a loan for any other persons? Yes (if yes provide details) No

FURTHER NOTES IN SUPPORT OF APPLICATION



AUTHORITY & DECLARATION

I/we give the broker express authority to act on my behalf with all lenders, product providers and associated parties in respect of obtaining a home loan eligibility and/or risk products associated with this application.

I/we understand that the broker does not charge me for these services, unless specifically agreed in writing in advance, but receives a commission from the lender providing the loan. The broker is not an employee, agent, partner, nor joint venture partner of, nor does the broker act on behalf of the lender. I/we acknowledge that personal information collected in this form and in the course of my dealings with the broker named in this application (broker) is collected initially for the purpose of assessing my application for mortgage finance and may be given to a number of lenders (each a lender) at the discretion of the broker. If my application is successful, I/we accept, that the information will be used by the lender for the purpose of administering the loan and by the lender and broker for administering any ongoing commission payments to the broker.

If the broker has an arrangement with the lender that the lender will pay ongoing commission over the term of the loan, the lender will periodically disclose the loan balance to the broker.

I/we accept that the broker and lender might use my personal information for market research purposes and to notify me/us of products or services that may be of interest to me/us.

I/we accept that the lender will, from time to time, make the information available to the lenders mortgage insurer (if any) any person with whom the lender proposes to enter into contractual arrangements, any security, trustee and any assignee or potential assignee of the lenders rights (the recipients). The name and address of the broker that will hold this information is:

The Lime Group (2015) Limited trading as Lime Group
PO Box 309 110 Thomas Road
Cambridge Rototuna, Hamilton

I/we understand that I/we are not required by law to provide any personal information to the broker but any failure to do so might prejudice any chances of obtaining finance.

I/we authorise:

- The Broker, the Lender and the Recipients to collect personal information about me from third parties including, but not restricted to, credit reporting agencies, banks and employers, and for those third parties to disclose information to the Broker, the Lender and the Recipients.
- The Lender to disclose my personal information to the Broker during the term of the loan in order to answer my queries or assist me with my financial arrangements as my circumstances change.
- The Broker, the Lender and the Recipients to disclose my personal information to credit reporting agencies and also to any third party making an authorised enquiry about me.
- The credit reporting agencies for the Broker, the Lender and the Recipients to hold my personal information on their systems and to use my personal information held on their systems to provide credit reporting services.
- The credit reporting agencies of the Broker, the Lender and the Recipients to provide my personal information to its customers using their credit reporting services.
- The Broker, the Lender and the Recipients to use the services of their credit reporting agencies in future for the purposes related to the provision of the loan and/or any other credit to me. This authorisation shall include the use of any monitoring services to receive updates about me if any of the personal information held about me changes.
- The Broker, the Lender and the Recipients to give information to credit reporting agencies about my default in any payment obligations.
- The credit reporting agencies of the Broker, the Lender and the Recipients to provide information about my default in any payment obligations to other customers of the credit reporting agencies.

I/we understand that pursuant to the Privacy Act 1993 I have the right to request access to and correction of any personal information held by the broker or by the lender.

I/we confirm that: (delete those not applicable)

- The information contained in the application is true and correct;
- I am to meet legal and valuation costs;
- I am not registered for GST and will not be with respect to the security property;
- I am/will be registered for GST but the security property is not/will not be used for the purpose of a taxable activity;
- I am/will be registered for GST and the security property is/will be used for the purposes of a taxable activity.

I/we acknowledge that as part of the intended financing transaction I should review my personal risk insurance requirements.

I acknowledge that I have been provided with a copy of the broker's Personal Disclosure Statement.

DECLARATION

I/We confirm that the information supplied in this application is true and correct as at the date listed below.

 Signed

 Signed

 Name Date

 Name Date

The LIME Group has a Duty of Care to provide our clients with the best possible insurance advice to protect their family and assets. We have a dedicated insurance team that can help our clients achieve this.

Client Disclaimer:

We acknowledge that we have been offered an insurance review by one of the LIME group representatives and have decided on the following option:

Option 1: []

We have no risk insurance and would like a LIME group Insurance Specialist to contact us and arrange an appointment.

Option 2: []

We have no risk insurance and decline the offer of an insurance review by the LIME group. We waive the LIME Group of any liability or loss as a result of our decision to decline.

Option 3: []

We currently have risk insurance but would like the LIME group Insurance Specialist to contact us to arrange an insurance review.

Current Insurance Provider: _____

Current Insurance Adviser: _____

Option 4: []

We currently have Risk Insurance but decline the offer of an insurance review by the LIME group. We waive the LIME Group of any liability or loss as a result of our decision to decline.

Client 1 Name: _____ Signature: _____

Client 1 Name: _____ Signature: _____

Adviser observations: _____

