

Finance Application – Novated Lease

Date: _____

Personal Details:

Applicant's full name: _____ Male Female D.O.B.: _____

Home address: _____
Street Name & Number City/Suburb State Post Code

Home ownership: Own Mortgage Rent Board

How many years at current address: _____ How many years at previous address: _____ If renting or boarding Landlord/Agent name: _____ Rent p/m: _____

Previous address: (if less than 3 years) _____
Street Name & Number City/Suburb State Post Code

Postal address: _____
PO Box or Street Name & Number City/Suburb State Post Code

Home phone: _____ Work phone: _____

Mobile: _____ Work fax: _____

Work email: _____ Personal email: _____
Tick preferred email address (N.B. monthly Account Statements & general communication will be sent to preferred email)

Drivers licence no: _____ Licence expiry: _____

Spouses Name: _____ Spouse's Income: _____

Spouse's Employer: _____ Dependants: _____

Personal Details:

Name of employer: _____ Start date: _____

Business title: _____ Annual salary: _____

Previous employer: (if less than 3 years) _____ Years with previous employer: _____

Previous position: _____ Previous salary: _____

Vehicle & Lease Details:

Vehicle make: _____ Vehicle model: _____

Compliance date: _____ Body type: _____

Supplier: _____ Contact name: _____

Supplier phone: _____ Supplier fax: _____

Amount required: _____ Term (months): _____

Residual: _____ Annual km: _____

STATEMENT OF ASSETS & LIABILITIES

ASSETS

DESCRIPTION	DETAILS	ESTIMATED VALUE
Property:	Residential home	
Investment Property/ies:	Total monthly rental income =	
Motor Vehicle 1:	Year / Make / Model	
Motor Vehicle 2:	Year / Make / Model	
Cash at Bank:	Approximate cash holding in all bank accounts	
Shares:	Approximate value of entire share portfolio	
Furniture & Valuables:	Insured value or estimated total value	
Other Assets, Investments:	Brief Details	
TOTAL ASSETS:		

LIABILITIES

DESCRIPTION	BANK / FINANCIAL INSTITUTION	TOTAL OWING	MONTHLY PAYMENT
Home Mortgage:			
Investment Mortgages:			
Motor Vehicle 1:			
Motor Vehicle 2:			
Personal Loan/s:			
Advance on Shares:			
Credit Card/s:			
Other Liabilities:			
TOTAL LIABILITIES:			
NET ASSET POSITION:			