

Address: 230 Great South Road, Papatoetoe. Phone: 02102268616 . email: applications@logicfinance.co.nz

Personal Details of Applicant 1	
Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/> other: _____	
First Name(s)	Surname
Date of Birth	Country of Birth
NZ Residency Held? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Marital Status <input type="checkbox"/> Married <input type="checkbox"/> De Facto <input type="checkbox"/> Single	Sex <input type="checkbox"/> Male <input type="checkbox"/> Female
Age of Dependents <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Current Residential Address _____ _____	
Postal Address (if different from above) _____ _____	
Time at this address <input type="text"/> Years <input type="text"/> Months	
If less than 3 years what was your previous address: Years Months	
_____	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>
Are you currently? (Please tick one)	
<input type="checkbox"/> Renting <input type="checkbox"/> Boarding <input type="checkbox"/> Living in own home <input type="checkbox"/> Other	
Home Phone Number	Work Phone Number
Mobile Phone Number	Other
Email: Preferred email contact	
Home _____	<input type="checkbox"/>
Work _____	<input type="checkbox"/>

Personal Details of Applicant 2	
Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/> other: _____	
First Name(s)	Surname
Date of Birth	Country of Birth
NZ Residency Held? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Marital Status <input type="checkbox"/> Married <input type="checkbox"/> De Facto <input type="checkbox"/> Single	Sex <input type="checkbox"/> Male <input type="checkbox"/> Female
FILL OUT DETAILS BELOW ONLY IF DIFFERENT FROM APPLICANT 1	
Age of Dependents <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Current Residential Address _____ _____	
Postal Address (if different from above) _____ _____	
Time at this address <input type="text"/> Years <input type="text"/> Months	
If less than 3 years what was your previous address: Years Months	
_____	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>
Are you currently? (Please tick one)	
<input type="checkbox"/> Renting <input type="checkbox"/> Boarding <input type="checkbox"/> Living in own home <input type="checkbox"/> Other	
Home Phone Number	Work Phone Number
Mobile Phone Number	Other
Email: Preferred email contact	
Home _____	<input type="checkbox"/>
Work _____	<input type="checkbox"/>

Employment	
Main Source of Income <input type="checkbox"/> Salary/Wages <input type="checkbox"/> Self Employed <input type="checkbox"/> Other	
Employer / Business Name _____	
Occupation / Role _____	
Type of Business _____	
How Long <input type="text"/> Years <input type="text"/> Months	
If less than 3 years, employment prior to that: Years Months	
_____	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>

Employment	
Main Source of Income <input type="checkbox"/> Salary/Wages <input type="checkbox"/> Self Employed <input type="checkbox"/> Other	
Employer / Business Name _____	
Occupation / Role _____	
Type of Business _____	
How Long <input type="text"/> Years <input type="text"/> Months	
If less than 3 years, employment prior to that: Years Months	
_____	<input type="text"/> <input type="text"/>
_____	<input type="text"/> <input type="text"/>

Proposed Monthly Income & Expenditure

Income		
	ANNUAL GROSS	MONTHLY NET
Salary/Wage 1 _____	\$ _____	\$ _____
Salary/Wage 2 _____	\$ _____	\$ _____
Business 1 _____	\$ _____	\$ _____
2 _____	\$ _____	\$ _____
Benefits 1 _____	\$ _____	\$ _____
2 _____	\$ _____	\$ _____
Interest/Dividends _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____
Rental (as below)		
Scaled @ 75 %	\$ _____	\$ _____
Boarder/Flatmate		
\$ _____ per week @ _____ %	\$ _____	\$ _____
TOTAL INCOME	\$ _____	\$ _____

(A)

Expenses (Monthly)						
Home Loans / Overdrafts				New Existing		
\$ _____	@ _____ %	_____ yrs	<input type="checkbox"/>	<input type="checkbox"/>		\$ _____
\$ _____	@ _____ %	_____ yrs	<input type="checkbox"/>	<input type="checkbox"/>		\$ _____
\$ _____	@ _____ %	_____ yrs	<input type="checkbox"/>	<input type="checkbox"/>		\$ _____
\$ _____	@ _____ %	_____ yrs	<input type="checkbox"/>	<input type="checkbox"/>		\$ _____
\$ _____	@ _____ %	_____ yrs	<input type="checkbox"/>	<input type="checkbox"/>		\$ _____
\$ _____	@ _____ %	_____ yrs	<input type="checkbox"/>	<input type="checkbox"/>		\$ _____
Credit/Charge cards	Limit(s) \$ _____					\$ _____
Store Card	Limit(s) \$ _____					\$ _____
Personal Loans	\$ _____ @ _____ %					\$ _____
Car Loan	\$ _____ @ _____ %					\$ _____
Student Loans	\$ _____ @ _____ %					\$ _____
Hire Purchase	\$ _____ @ _____ %					\$ _____
Lender _____						\$ _____
Lender _____						\$ _____
Child Support / Child Care / Day Care / School Fees						\$ _____
Rent to pay / Board						\$ _____
Income Protection Ins/MPI Allowance/Cost						\$ _____
Life Medical Insurance Allowance/Cost						\$ _____
Home Insurance / Contents Insurance						\$ _____
Property(s) Rates {Council Rates / Water Rates} Motor Vehicle C						\$ _____
Insurance/Running/WOF/Registration Power / Phone(s) / Internet /						\$ _____
Gas / Sky TV / Etc. Living Expense – Adults(s) {Food/Clothing/General}						\$ _____
Living Expenses – Children {Food/Clothing/General}						\$ _____
Superannuation						\$ _____
Other: _____						\$ _____
Other: _____						\$ _____
TOTAL MONTHLY EXPENSES (B)						\$ _____
LESS NET MONTHLY INCOME (A)						\$ _____
NET MONTHLY SURPLUS (A – B)						\$ _____

Rental Income		
	<input type="checkbox"/> Existing <input type="checkbox"/> Proposed	Per Week
1. Address _____		\$ _____
	<input type="checkbox"/> Existing <input type="checkbox"/> Proposed	Per Week
2. Address _____		\$ _____
	<input type="checkbox"/> Existing <input type="checkbox"/> Proposed	Per Week
3. Address _____		\$ _____
TOTAL RENTAL INCOME PER WEEK		\$ _____

Statement of Assets and Liabilities (as at Date of Application)

Assets		(Approximately)
Main Bank / Branch _____		\$ _____
Money @ Bank / Other 1 _____		\$ _____
2 _____		\$ _____
3 _____		\$ _____
Property(s) 1 _____		\$ _____
2 _____		\$ _____
3 _____		\$ _____
Shares/Bonds _____		\$ _____
Vehicles 1 _____ Yr _____		\$ _____
(Make & Model) 2 _____ Yr _____		\$ _____
3 _____ Yr _____		\$ _____
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 (A)		\$ _____

Liabilities			(Approximately)
	Limit Amount	Outstanding Amount	
Overdraft	Limit \$ _____		\$ _____
Mortgages	Bank _____		\$ _____
1 Bank _____			\$ _____
2 Bank _____			\$ _____
3 Bank _____			\$ _____
Personal Loan(s)	From _____		\$ _____
Car Loan(s)	From _____		\$ _____
Hire Purchase	1 From _____		\$ _____
2 From _____			\$ _____
Credit/Store	From _____		\$ _____
Charge Cards	Limit \$ _____		\$ _____
From _____			\$ _____
Limit \$ _____			\$ _____
From _____			\$ _____
Limit \$ _____			\$ _____
Student Loans	_____		\$ _____
Other Liabilities	_____		\$ _____
TOTAL LIABILITIES (B)			\$ _____
NET SURPLUS (A – B)			\$ _____
TOTAL (Per Total Assets)			\$ _____

Client and Adviser Declarations and Acknowledgements

- I/We give my/our authority to Logic Finance Limited and or its representative to act on our/my behalf to arrange the funding sort.
- I/We understand that if we do not disclose all information and then new information comes to light that affects my/our ability to borrow that a loan offer may subsequently be withdrawn or declined due to non-disclosure. I/We will still be obligated to pay the fee for arranging the loan.
- **That I/we have received a disclosure statement prior to proceeding with the Loan Application.**
- That I/we confirm the deposit, if applicable, has been gained by lawful means.
- That I/we agree to receive promotional electronic messages as deemed appropriate from the Adviser and the Lender/s.
- I/We acknowledge that the information in all the documents attached to this Declaration is an accurate summary of my/our personal and financial situation at this point in time.
- I/We acknowledge that as a part of ensuring the Adviser maintains industry best practice standards, the Adviser's records and procedures, including my/our files will be subject to a regular compliance review performed by external reviewers and/or the Regulator.
- If logic finance charges me/us a fee for services relating to arranging a loan with the lender on my/our behalf it is a matter to be negotiated between myself /ourselves and logic finance and is not paid to the lender . I /we acknowledge that the fee it is not a requirement of the lender for processing and , approving our loan application

Privacy Act Acknowledgements: I/We are aware:

- My/our information will also be held by any Lenders approached by the Adviser in the course of arranging the loan. I/we understand that I/we are not required by law to provide any personal information to the Adviser, but that failure to do so will result in the Adviser being unable to obtain finance on my behalf.
- I/we have a right to request access to and correction of any personal information held by the Adviser or by the Lender.
- That the personal information collected in this form and in the course of my dealings with the Adviser is collected initially for the purposes of assessing my application for mortgage finance and may be given to a number of Lenders at the Adviser's discretion. If my application is successful, I understand that the information will be used by the Lender for the purpose of administering the loan, and by the Lender and Adviser for administering any ongoing commission payments to the Adviser. If the Adviser has an arrangement with the Lender that the Lender will pay an ongoing commission over the term of my loan, the Lender will periodically disclose the loan balance to the Adviser. I understand that the Adviser and Lender might also use my personal information for the purposes of market research and from time to time to notify me of products or services that may be of interest to me.
- That the Lender will, from time to time, make the information available to the Lender's 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 Lender's rights (the "Recipients").

I/We authorise:

- The Adviser, 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 Adviser, the Lender and the Recipients.
- The Lender to disclose my personal information to the Adviser during the term of the loan in order to answer my queries or assist me with my financial arrangements as my circumstances change.
- The Adviser, 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 of the Adviser, the Lender and the Recipients to hold my personal information on their systems and to use my personal information to provide their credit reporting services.
- The credit reporting agencies of the Adviser, the Lender and the Recipients to provide my personal information to customers using their credit reporting services.
- The Adviser, the Lender and the Recipients to use the services of their credit reporting agencies in future for 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 Adviser, the Lender and the Recipients to give information to credit reporting agencies about my default in any payment obligations to the lender or adviser and to provide information about my default in any payment obligations to other customers of the credit reporting agencies.
- The credit reporting agencies of the Adviser, 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 confirm:

- that the information contained in this application is true and correct
 - I/we will meet legal and valuation costs
 - I am/we are not registered for GST and will not be with respect to the security property
- or, I am/will be registered for GST but the security property is not/will not be used for the purposes of a taxable activity
- or, I am/will be registered for GST and the security property is/will be used for the purposes of a taxable activity

Signed by Client

Signed by Client

Full Name

Full Name

Date

Date