

Personal Details of Applicant 1	
Surname Mr Mrs Ms Miss Dr	
First Name(s)	
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
DOB 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: <input type="text"/> Years <input type="text"/> Months 	
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	
Surname Mr Mrs Ms Miss Dr	
First Name(s)	
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	
DOB 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: <input type="text"/> Years <input type="text"/> Months 	
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	
Occupation	
Employer/Business Name	
Type of Business	
How Long <input type="text"/> Years <input type="text"/> Months	
If less than 3 years, prior to that: <input type="text"/> Years <input type="text"/> Months 	

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

STATEMENT OF ASSETS AND LIABILITIES

Assets		(Approximately)
Main Bank		

@ Bank / Other	1 _____	\$ _____
	2 _____	\$ _____
	3 _____	\$ _____
Property		
1	_____	\$ _____
2	_____	\$ _____
3	_____	\$ _____
4	_____	\$ _____
5	_____	\$ _____
Shares/Bonds	_____	\$ _____
Vehicles	1 _____	\$ _____
	2 _____	\$ _____
	3 _____	\$ _____
Superannuation / Kiwisaver	1 _____	\$ _____
	2 _____	\$ _____
Life Insurance		\$ _____
		\$ _____
		\$ _____
Business Value (net)		\$ _____
Boat / Caravan		\$ _____
Other Assets	1 _____	\$ _____
	2 _____	\$ _____
	3 _____	\$ _____
Furniture & Personal Effects		\$ _____
TOTAL ASSETS (A)		\$

Liabilities		(Approximately)
Overdraft	Limit \$ _____	\$ _____
	Bank _____	\$ _____
Mortgages	1 Bank _____	\$ _____
	2 Bank _____	\$ _____
	3 Bank _____	\$ _____
	4 Bank _____	\$ _____
	5 Bank _____	\$ _____
Personal Loan	1 From _____	\$ _____
	2 From _____	\$ _____
Hire Purchase	1 From _____	\$ _____
	2 From _____	\$ _____
Credit/Store	Limit \$ _____	\$ _____
Charge Cards / Buy Now Pay Later	From _____	\$ _____
	Limit \$ _____	\$ _____
	From _____	\$ _____
	Limit \$ _____	\$ _____
	From _____	\$ _____
Student Loans	_____	\$ _____
Other Liabilities	_____	\$ _____
TOTAL LIABILITIES (B)		\$
NET SURPLUS (A – B)		\$

Are you guaranteeing a loan for any other person/s? Yes No (if yes, please provide details):

STATEMENT OF INCOME AND EXPENSES

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

(A)

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	\$	
<input type="checkbox"/> Existing <input type="checkbox"/> Proposed	Per Week	
4. Address	\$	
<input type="checkbox"/> Existing <input type="checkbox"/> Proposed	Per Week	
5. Address	\$	
TOTAL RENTAL INCOME PER WEEK \$		

Expenses		
Mortgages		
\$ @ %	yrs <input type="checkbox"/> New <input type="checkbox"/> 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"/>	\$
Student Loans		\$
Hire Purchase		
Lender		\$
Lender		\$
Credit/Charge cards	Limit(s) \$	\$
Store cards /Buy now pay later	Limit(s) \$	\$
Child Support/Child care		\$
Rent to pay		\$
Superannuation		\$
Kiwisaver		\$
Life Insurance		\$
Contents Insurance		\$
House Insurance		\$
Council Rates		\$
Medical Insurance		\$
Motor Vehicle Insurance		\$
Motor Vehicle Running & Rego Costs		\$
Power/Telephone/Gas / Internet		\$
Food/Clothing/General		\$
TOTAL MONTHLY EXPENSES (B)	\$	
LESS NET MONTHLY INCOME (A)	\$	
NET MONTHLY SURPLUS (A – B)	\$	

AUTHORITY AND DECLARATION

Applicant One

Full Name:

Date of Birth: / /

Email Address:

Mobile:

Applicant Two (if applicable)

Full Name:

Date of Birth: / /

Email Address:

Mobile:

I/We authorize that the information contained in this application form may be used by and relied on by the lending institutions. This will include the lenders respective Mortgage Guarantee Insurance Company and credit reference agencies.

- Moneykart Ltd and the Lender to collect and hold personal information about me from third parties including, but not restricted to, credit reporting agencies, banks and employers.
- Moneykart Ltd and the Insurer to obtain all relevant personal information including but not limited to personal medical records and existing insurance cover and terms where I/we have asked Moneykart Ltd to undertake an insurance review.
- Moneykart Ltd to use our personal information to negotiate mortgage and/or insurance terms, process mortgage and/or insurance applications and/or process or manage insurance claims on our behalf.
- Moneykart Ltd and the Lender to use our personal information to assess the application and, if the application is successful, to administer the loan as well as to manage the customers relationship with the lender and/or Insurer to disclose my personal information to Moneykart Ltd during the term of the mortgage and/or insurance policy in order to answer my queries or assist me with my financial arrangements as my circumstances change.
- Moneykart Ltd and the Lender to disclose my personal information to credit reporting agencies and also to any third party making an authorised enquiry about me/us.
- The credit reporting agencies of Moneykart Ltd and the Lender, 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 Moneykart Ltd and the Lender to provide my personal information to its customers using their credit reporting services.
- Moneykart Ltd and the Lender to use the services of their credit reporting services in future for the purposes related to the provision of the mortgage and/or any other credit to me/us. This authorization shall include the use of any monitoring services to receive updates about me/us if any of the personal information held about me changes.
- Moneykart Ltd and the Lender to give information to credit reporting agencies about my default in any payment obligations.
- The credit reporting agencies of Moneykart Ltd and the Lender to provide information about my default in any payment obligations to other customers of the credit reporting agencies

I understand that pursuant to the Privacy Act 2020, I have a right to request access to and correction of any personal information held by Moneykart Ltd or by the Lender or by the Insurer.

I/we acknowledge and agree (including where the borrower is the company, the individual director(s)) that:

- I/we provided our consent to Moneykart Ltd to pass on my/our personal contact details to the Lender.
- I/we have read and understood Moneykart Ltd.'s Terms of Engagement and consent to how my/our personal information will be collected, stored, used and shared.
- The Moneykart Ltd Adviser is not an agent of any Lender, and the Lender is not an agent of Moneykart Ltd
- Moneykart Ltd does not have my authority to bind the Lender in any way responsible for any advice, statement or representation made by the Adviser concerning my/our application.
- Moneykart Ltd is my/our agent in respect of my/our application and any mortgage(s) and as such is authorised to provide the Lender with instructions (including in relation to the ongoing maintenance of my/ our mortgage(s)) unless or until I/we advise Moneykart Ltd otherwise. The Lender can rely on this authority without the need to make further enquiry I/we consent to Moneykart Ltd disclosing to the Lender and to Moneykart Ltd obtaining from the Lender, any information in respect of my/our application and/or my/our mortgage(s) which may relate to me/us, including:
- Information concerning the progress and status of my/our application.
- Details, including for example, mortgage type, amount and terms and dates and amounts of drawdowns and associated security of any mortgage or facility taken out with the Lender by me/us.
- Information about the ongoing maintenance of my/our mortgage(s) loan balance and loan and information relating to the calculation of commission payable.

ACKNOWLEDGEMENTS

I/we may be required to evidence that I have explained specific requirements or obligations and provided certain information to you.

Please tick as applicable:

I/we confirm that the information provided in this application is true and complete.

I/we acknowledge that I/we have received a Disclosure Statement from our Moneykart Ltd Adviser

I/we acknowledge I/we have read and understood the information relating to the Privacy Act 2020 and how this information may be used.

I/we acknowledge that I/we have received a copy of Moneykart Limited's Terms of Engagement/Disclosure and understand the information related to how Moneykart Ltd is paid and the situations where Moneykart Ltd may charge me a fee and/or recover a commission claw back from me/us.

Applicant One

Applicant Two

Date

Signature One

Signature Two

Date