

## APPLICATION DETAILS

Loan Type	<input type="text"/>
Loan Reason	<input type="text"/>
Application Type	Individual

## LOAN DETAILS

Deposit Amount	<input type="text"/>	Registration Amount	<input type="text"/>
Purchase Price	<input type="text"/>	Monthly Instalment Method	<input type="text"/>
Repayment Day	<input type="text"/>		
Repayment Source of Funds	Salary/ Wages		
Add More Source of Funds	<input type="button" value="Remove"/> <input type="button" value="Add"/>		
Collateral Offered	<input type="text"/>	Collateral Type	<input type="text"/>
Collateral Amount	<input type="text"/>		
Interest Rate Option	Variable		
Initiation Fee Payment	<input type="text"/>		
Apply For Access Flexi Bond	No	Flexi Reserve Further Option	<input type="text"/>
Include Costs	No	Bond Costs	R 0.00
Debt Consolidation	No	Debt Consolidation Option	<input type="text"/>

## PERSONAL DETAILS - MAIN APPLICANT

Name	<input type="text"/>	Surname	<input type="text"/>
Title	<input type="text"/>	Gender	<input type="text"/>
Date of Birth	<input type="text"/>	Tax Obligations Outside Sa	<input type="text"/>
ID Type	<input type="text"/>	Type of Residence	SA Citizen
ID Number	<input type="text"/>		
Suretyship	<input type="text"/>	Marital Status	<input type="text"/>
Number Of Dependents	<input type="text"/>	Ethnic Group	<input type="text"/>
Highest Qualification	<input type="text"/>	Home Language	<input type="text"/>
Nationality	South Africa	Country of Birth	South Africa
Is First Time Buyer	<input type="text"/>	Smoked in Last Year	<input type="text"/>
On Social Grant	<input type="text"/>	Will Be Main Residence	<input type="text"/>
City Of Birth	<input type="text"/>	Country Of Marriage	South Africa

**CONTACT DETAILS - MAIN APPLICANT**

Phone Number	<input type="text"/>	Cell Number	<input type="text"/>
Work Phone Number	<input type="text"/>	Email Address	<input type="text"/>
Fax Number	<input type="text"/>		

**ADDRESS DETAILS - MAIN APPLICANT**

Physical Address Line 1	<input type="text"/>	Physical Address Line 2	<input type="text"/>
Suburb	<input type="text"/>	City/Town	<input type="text"/>
Postal Code	<input type="text"/>	Province	<input type="text"/>
Country	South Africa	Postal Same as Physical	Yes
Residential Status	<input type="text"/>	Occupied Since	<input type="text"/>
Contact Method	<input type="text"/>	Preferred Language	<input type="text"/>

**EMPLOYMENT DETAILS - MAIN APPLICANT**

Employment Status	<input type="text"/>	Occupation Level	<input type="text"/>
Employment Sector	<input type="text"/>	Occupation Nature	<input type="text"/>
Source of Income	Salary/ Wages	Salary Frequency	<input type="text"/>
Changing Jobs	<input type="text"/>	Do You Work In South Africa	<input type="text"/>
Employer Name	<input type="text"/>	Is This Your First Job	<input type="text"/>
Employer Address	<input type="text"/>	Suburb	<input type="text"/>
City	<input type="text"/>	Postal Code	<input type="text"/>
Province	<input type="text"/>	Country	South Africa
Business Nature	Other Service Activities	Years Employer Operating	<input type="text"/>
Employee Number	<input type="text"/>		
Length at Current Employment (Years)	<input type="text"/>	Length at Current Employment (Months)	<input type="text"/>

Is Your Current Employment Under 3 Years      Yes       No

**SOLVENCY DETAILS - MAIN APPLICANT**

Have you been declared insolvent?	<input type="radio"/> Yes	<input type="radio"/> No
Have you been rehabilitated?	<input type="radio"/> Yes	<input type="radio"/> No
Have you ever had a dispute with a credit bureau?	<input type="radio"/> Yes	<input type="radio"/> No
Have you ever had a judgement?	<input type="radio"/> Yes	<input type="radio"/> No
Have you ever been under an administration order?	<input type="radio"/> Yes	<input type="radio"/> No
Are you currently under an administration order?	<input type="radio"/> Yes	<input type="radio"/> No
Are you currently under debt review?	<input type="radio"/> Yes	<input type="radio"/> No
Do you currently have a debt arrangement in place?	<input type="radio"/> Yes	<input type="radio"/> No

**BANK DETAILS**

Institution / Bank	Branch	Account Holder	Account Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Number	Current Balance on Statement	Business	Primary
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			<input type="button" value="Remove"/> <input type="button" value="Add"/>

Statement Approval

The banks occasionally collaborates with the other financial institutions with the aim of providing a better service to the customers. In these dealings, the banks diligently guards all personal and financial information relating to customers. In keeping with this commitment, we need your consent to:  
 Retrieve: Obtain your bank statement(s) from other financial institutions that you may have specified in an application form.  
 Supply: Provide your bank statement(s) to other financial institutions that may request them.

(Please ensure that you sign the IDX Consent document and send to the consultant)

Do you consent to the above?    Yes     No

**MONTHLY INCOME - MAIN APPLICANT**

**SALARY AND COMMISSION INCOME**

(Please note the Consultant Check section will be completed after the application is submitted if any amendments are picked up)

Basic Wage/Salary	<input type="text"/>	Consultant Check	<input type="text"/>
Housing Subsidy	<input type="text"/>	Consultant Check	<input type="text"/>
Monthly Car Allowance	<input type="text"/>	Consultant Check	<input type="text"/>
Travel Allowance	<input type="text"/>	Consultant Check	<input type="text"/>
Cash Allowance	<input type="text"/>	Consultant Check	<input type="text"/>
Average Commissions	<input type="text"/>	Consultant Check	<input type="text"/>
Average Overtime	<input type="text"/>	Consultant Check	<input type="text"/>
Other: (Specify)	<input type="text"/>		
Other Income Value	<input type="text"/>	Consultant Check	<input type="text"/>
<b>TOTAL GROSS SALARY</b>	<input type="text"/>	<b>TOTAL CHECK</b>	<input type="text"/>

**OTHER MONTHLY INCOME**

Rental Income (Derived from Assets & Liabilities)	<input type="text"/>	Consultant Check	<input type="text"/>
Future Rental Income	<input type="text"/>	Consultant Check	<input type="text"/>
Investments	<input type="text"/>	Consultant Check	<input type="text"/>
Income from Sureties	<input type="text"/>	Consultant Check	<input type="text"/>
Maintenance/Alimony	<input type="text"/>	Consultant Check	<input type="text"/>
Entertainment	<input type="text"/>	Consultant Check	<input type="text"/>
Interest Income	<input type="text"/>	Consultant Check	<input type="text"/>
<b>TOTAL OTHER INCOME</b>	<input type="text"/>	<b>TOTAL OTHER</b>	<input type="text"/>

**SALARY DEDUCTION**

UIF	<input type="text"/>	Consultant Check	<input type="text"/>
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Tax - PAYE/SITE	<input type="text"/>	Consultant Check	<input type="checkbox"/>
Pension	<input type="text"/>	Consultant Check	<input type="checkbox"/>
Medical Aid	<input type="text"/>	Consultant Check	<input type="checkbox"/>
Other: (Specify)	<input type="text"/>		
Other	<input type="text"/>	Consultant Check	<input type="checkbox"/>
TOTAL SALARY DEDUCTIONS	<input type="text"/>	TOTAL CONSULTANT	<input type="text"/>

**MONTHLY EXPENSES - MAIN APPLICANT**

**MONTHLY EXPENSES**

Expense Type	Amount	Can Fall Away	Consultant Check
Assurance (Life, Retirement Annuities)	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Clothing (If not included in retail deductions)	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Donations	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Rental	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Rates & Taxes	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Levies	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Water & Lights	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Petrol and Car Maintenance	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Property Rental Expenses	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Insurance and Funeral Policies	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Groceries	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Education	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Entertainment	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Cellphone	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Telephone and ISP	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
MNET, DSTV / TV Licence	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Domestic Wages	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Home Maintenance / Garden Services	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Investments (Unit Trusts, Endowments)	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Maintenance / Alimony	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Medical (If not included in salary deductions)	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Security	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Timeshare	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
Other: Specify	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/>
TOTAL EXPENSES	<input type="text"/>	TOTAL CONSULTANT	<input type="text"/>

**INCOME AND EXPENSES TOTALS**

Income  Deductions  Expenses  Nett

Consultant Check Comment

**ASSETS AND LIABILITY DETAILS - MAIN APPLICANT**

**FIXED PROPERTY**

Description	Purchase Date	Purchase Amount	Valuation	Rental Income
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Finance Institution	Account Number	Loan Balance	Instalment	Settle
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**VEHICLES**

Make & Model	Finance Institution	Account Number	Valuation	Loan Balance	Instalment	Settle
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**INVESTMENTS & OTHER ASSETS**

Asset Type	Description	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

**RETAIL ACCOUNTS**

Description	Balance	Instalments	Settle	Reduction
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**OTHER LIABILITIES**

Type	Description	Finance Institution	Account Number	Balance	Instalment	Settle
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**TOTALS**

Total Assets  Less Liabilities:  Net Asset Value

**GRAND TOTALS**

Income  Deductions  Expenses  Liabilities  Nett

## DECLARATION

I hereby appoint MortgageMax as my exclusive agent, in order to obtain mortgage loan finance on my behalf for the property specified on this application form. I hereby consent to MortgageMax providing feedback to the estate agency concerned about the outcome of my mortgage loan finance application. I hereby consent to MortgageMax using, storing and sharing my personal information (as set out on this form) with companies within its group and with its service providers. I further agree to receive information about other products and services that MortgageMax thinks may be of interest to me. I acknowledge that I have the right to opt-out of such future communications. I confirm that the advantages of putting down a deposit when financing a property has been discussed with me. I warrant that all the information that I supplied in this application form is to the best of my knowledge and belief true and correct in all material respects. I am not aware of any other information which, should it become known to the Bank, would affect the consideration of my application in any way. I agree that the Bank may provide any information pertaining to the loan applied for to MortgageMax during the application process. I hereby authorise the Bank to have access to my credit bureau records and to furnish and/or to disclose any information arising from any agreement entered into with the Bank to any such credit bureaus. I hold no other citizenships and residencies for local and international tax purposes, other than those disclosed in this application form and will inform the lender in writing of any change of this status within 30 days of the change of status.

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