



Mike Whittaker
MORTGAGES

APPLICATION FORM

Thank you for choosing MW Mortgages.
Let us know what you are after and if you have any
questions at all during the application process,
we are on hand to help and make this as easy
as possible for you.

First Home Loan

Re-financing

Top Up

Debt Consolidation

Buy a section & build

Buy a section

Buy and Sell

Buy an Investment
Property

Mike Whittaker
Ph: 0800 579 324
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PERSONAL DETAILS OF APPLICANT 1

Mr Mrs Ms Miss Dr

First Name

Middle Name/s

Surname

Marital Status Married De Facto Single Sex: M F

Date of Birth Country of Birth

Residency NZ Permanent Visa Resident/Visa Non Resident

Home Phone Mobile Phone

Email

Dependants Age: Age: Age: Age:

EMPLOYMENT

Main Income: Salary/Wages Self-Employed Other

Occupation Length: years months

Employer/Business Type of Bus.

Gross Annual Income \$

If less than 3 years—prior to that:

Occupation: Employer:

Length: years months

Occupation: Employer:

Length: years months

Do you receive any benefits? eg. working for Families Y N \$ W F

ADDRESS

Current Residential Address:

Suburb City

Time there years months

Postal Address (if different from current address):

Are you currently: Renting Boarding Own home Other

If less than 3 years, list previous address

Suburb City

Time there years months



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PERSONAL DETAILS OF APPLICANT 2

Mr Mrs Ms Miss Dr

First Name

Middle Name/s

Surname

Marital Status Married De Facto Single Sex: M F

Date of Birth Country of Birth

Residency NZ Permanent Visa Resident/Visa Non Resident

Home Phone Mobile Phone

Email

Dependants Age: Age: Age: Age:

EMPLOYMENT

Main Income: Salary/Wages Self-Employed Other

Occupation Length: years months

Employer/Business Type of Bus.

Gross Annual Income \$

If less than 3 years—prior to that:

Occupation: Employer:

Length: years months

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Do you receive any benefits? eg. working for Families Y N \$ W F

ADDRESS

Current Residential Address:

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Postal Address (if different from current address):

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STATEMENT OF ASSETS (at date of Application)

ASSETS:	ASB	SOVEREIGN
Bank/Branch	ANZ	SBS
	BNZ	TSB
	KIWIBANK	WESTPAC

Money at Bank/Other	1	\$
	2	\$
	3	\$

PROPERTY:

1		\$
2	Rent \$	W F \$
3	Rent \$	W F \$
4	Rent \$	W F \$
5	Rent \$	W F \$

Shares	\$
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Vehicles	1	\$
	2 / work car	\$
	3	\$
	4	\$

KiwiSaver	Client's Name 1	(SV) \$
	Client's Name 2	(SV) \$

Business Value (net)	\$
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Boat/Caravan	\$
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Other	1	\$
	2	\$

Furniture & Personal Effects	Estimate \$
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STATEMENT OF LIABILITES (at date of Application)

LIABILITIES (approximately)

Overdraft

Limit \$

Bank

Limit \$

Bank

Mortgages (include all limits, IE Flexi, Orbit Choices, everyday)

1. Bank	\$
2. Bank	\$
3. Bank	\$
4. Bank	\$
5. Bank	\$

Personal Loan / Business Loan

Please include all personal & business loans		Payment			Current Balance
1. From	\$	W	F	M	\$
2. From	\$	W	F	M	\$
3. From	\$	W	F	M	\$

Do you use Afterpay or Laybuy? Y N

1. From	\$	W	F	M	\$
2. From	\$	W	F	M	\$

Credit/Store Cards ie. All business cards, Farmers, QCard, Gem Visa

1. Bank	Limit \$
2. Bank	Limit \$
3. Bank	Limit \$
4. Bank	Limit \$
5. Bank	Limit \$
6. Bank	Limit \$

Student Loans

1. Name: Current Amt Owed \$

2. Name: Current Amt Owed \$

Are you guaranteeing a loan for any other persons? Y N



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CURRENT HOUSEHOLD EXPENSES

*Complete what you can and know or
leave blank*

Clothing / Shoes	W	F	M
Electricity / Gas	W	F	M
Groceries / Drink	W	F	M
Medical	W	F	M
Childcare / Daycare	W	F	M
Rates	W	F	M
Mobile Phone / Internet	W	F	M
Pay TV / Streaming	W	F	M
Entertainment	W	F	M
Health Insurance	W	F	M
Home & Contents	W	F	M
Life Insurance	W	F	M
Superannuation	W	F	M
Vehicle Insurance	W	F	M
Petrol	W	F	M
Vehicle Running costs	W	F	M
Rent	W	F	M
Other			

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YouTube: mikewhittakermortgages



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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 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:

Mike Whittaker - Mike Whittaker Mortgages Ltd

Name:

Address: **6a/114 St George's Bay Rd, Parnell, Auckland 1052**

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 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.

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 understand that should my circumstances change before the loan is repaid, I am responsible for continuing to make loan repayments.

I acknowledge that I have been provided a copy of the brokers Personal Disclosure Statement

A copy of my loan application form is available on request

Signed Signed

Name Name

Date Date