

Customer Requirements & Objectives

Resimac Accelerate



The introducer must complete this form after discussion with all Customer(s).

<input type="text"/>	<input type="text"/>
Customer's full name	Application ID
<input type="text"/>	<input type="text"/>
Loan amount sought	Term loan required for

CUSTOMER(S) OBJECTIVES

The Customer(s) objectives for the new Loan are (tick all that apply):

<input type="checkbox"/> Purchase a home (owner occupied)	<input type="checkbox"/> Refinance a home loan (owner occupied)	<input type="checkbox"/> Obtain a better interest rate
<input type="checkbox"/> Purchase and investment property	<input type="checkbox"/> Refinance an investment loan	<input type="checkbox"/> Other objective and purpose (please specify):
<input type="checkbox"/> Reduce loan as quickly as possible	<input type="checkbox"/> Minimise loan payments	<input type="text"/>
<input type="checkbox"/> Construct home	<input type="checkbox"/> Consolidate debts	
<input type="checkbox"/> Reduce overall commitments	<input type="checkbox"/> Working capital	
<input type="text"/>		

CUSTOMER(S) OBJECTIVES

The Customer(s) requirements for the new Loan are (tick all that apply):

<input type="checkbox"/> Variable interest rate	<input type="checkbox"/> Redraw	<input type="checkbox"/> Visa Debit card
<input type="checkbox"/> Split account	<input type="checkbox"/> Internet / online access	<input type="checkbox"/> Mortgage repayment insurance for death, disability and/or unemployment
<input type="checkbox"/> 100% interest offset feature	<input type="checkbox"/> Additional payments	<input type="checkbox"/> Other (please specify):
<input type="checkbox"/> Principal and interest payments	<input type="checkbox"/> Interest only then principal and interest	<input type="text"/>
<input type="checkbox"/> Fixed interest rate	<input type="checkbox"/> Construction: progressive drawdown loan	
<input type="text"/>		

If refinancing or debt consolidation, please provide details as to reasons why and outline the risks AND benefits in the transaction:

Living Expenses (tick to confirm):

I confirm that the living expenses noted in my loan submission were provided by the Customer(s) as a reasonable estimate of their costs for items such as food, clothing, medical, electricity, gas, rates, water, education, travel, child care, rent, phone, pay TV, gym, insurance and other incidental expenses.

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CUSTOMER(S) DECLARATION REGARDING FINANCIAL CIRCUMSTANCES

Do any of the customer(s) expect and increase / decrease in their income over the next 3 years (e.g. extended leave, retirement, reduction in working hours or overtime) Yes No

Do any of the customer(s) expect and increase / decrease in their expenses over the next 3 years (e.g. due to ill health, disability or end of an interest free period etc.) Yes No

Do any of the customer(s) expect and increase / decrease in their cash flow / profits over the next 3 years (e.g. due to ill health, disability etc.) Yes No

If "Yes" selected for any of the above, please provide explanation including the customer(s) strategy to continue to make the repayments:

I confirm I have completed a Preliminary Assessment and that the above is a true and correct representation of the above Customer(s) Requirements and Objectives and the Product recommended is not unsuitable.

Introducers Signature

Signature

Name in print

Date (DD/MM/YY): / /