

Section 1 – Borrower Details

Account Number (if known)

Borrower's name(s)

Section 2 – Financials

Assets

Savings	\$
Property (residential)	\$
Property (investment)	\$
Shares/Managed Funds	\$
Other	\$
TOTAL	\$

Liabilities

Mortgage (residential)	\$
Mortgage/Loans (investment)	\$
Leases	\$
Credit Cards	\$
Other (details)	\$
TOTAL	\$

Annual Income

Salary (pre-tax)	\$
Rental and dividends (pre-tax)	\$
Other income (details)	\$
Other (details)	\$
TOTAL	\$

Annual Expenditure

Mortgage payments/rent (residential)	\$
Mortgage/loan payments (investment)	\$
Lease payment	\$
Credit Card Payments	\$
Living expenses and school fees	\$
Other expenses (details)	\$
TOTAL	\$

Section 3 – Additional Requirements

Please attach the following documents for each borrower as appropriate:

- Individuals: Two recent payslips or latest two tax returns
- Companies: Two most recent years' financial statements

Section 4 – Declaration and Signing

I/We confirm that the above details are true and correct.

Borrower 1
 Full name

Borrower 2
 Full Name

Signature

Signature

Date
 / /

Date
 / /



Please send the completed form and relevant attachments to:
BankSA Margin Lending
Reply Paid 1467
Royal Exchange NSW 1224
 or fax to 1300 179 540 (International 61 2 9995 8292)