

- N- 4 0 N 4	Introducer company name:	Broker ID:
T 844 - 2420	Primary contact:	e-mail:
OTTO NEW PRINT	Mobile number:	
ORIGO & A	Secondary contact:	e-mail:
COMPLAG	Mobile number:	

P&I = Principal & interest IO = Interest only

Rate Review Form

		-					
Loan account number ending in:							
This is what I have now (current sta	te):						
\circ	Variable		Variable	\bigcirc	Variable	\bigcirc	Variable
\bigcirc	Fixed		Fixed	\bigcirc	Fixed	\bigcirc	Fixed
	P&I		P&I	\bigcirc	P&I	\bigcirc	P&I
\circ	Ю		Ю	\bigcirc	IO	\bigcirc	Ю
This is what I would like to have (fur	ture state), subject to m	у асс	eptance:				
\circ	P&I	\bigcirc	P&I		P&I	\bigcirc	P&I
\circ	Variable	\bigcirc	Variable	\bigcirc	Variable	\bigcirc	Variable
\circ	IO for:	\bigcirc	IO for:		IO for:		IO for:
	, and years		, and years		, and years		, and years
\circ	Fixed for:	\bigcirc	Fixed for:		Fixed for:		Fixed for:
	to years		to years		to years		to years
I'd also like to speak to my broker a	bout						
\circ	Purchase	\bigcirc	Construction		Refinance	\bigcirc	Business
\circ	Owner occupied	\bigcirc	Investment	\bigcirc	Property development	\bigcirc	Working capital
For example: renovation, relocation	n, debt consolidation, sc	hool	fees, holiday, car etc.				

The benefits of a quick rate review (all we need is a snap shot of your income & expenditure "as at today")

- Faster, easier, less expensive & much more flexible because we already know you
- The loan does not start all over again increasing ones total life of loan interest component
- No application, valuation or legal fees
- No mortgage discharge fees
- No disruption to ones internet banking, direct debits & ease of use
- No credit checks & requirements are kept to a minimum
- Non invasive because we don't call your employer or accountant
- Probability of a better outcome is above 90%

SECTION 1:	Rate review for
First name:	
Marital status:	Married Single Single Single
	○ De Facto ○ Separated ○ De Facto ○ Separated
Residential status:	Australian citizen Permanent resident Australian citizen Permanent resident
	Temporary resident Non resident Temporary resident Non resident
First name of child :	Date of birth:
First name of child :	Date of birth:
First name of child :	Date of birth:
First name of child :	Date of birth:
Mobile number:	
International number:	+
Personal email:	
Business email:	



SECTION 2:	Curr	ent a	add	ress																		
Address:			/																			
State/Territory:			Ро	stcode:																		
How long have you been		Year	's ar	nd/or					nths													
at this address? Status:		Owner							ontin	a at				d						nor		.lz
Status.		Owner	OH titi	ie .					entin			family/friends \$						per week				
									iving	vvitri	IdIII	пулте	enus	*		,				per	wee	eK
		h would prevent an applicant from qualifying for a rate review today:																				
		ants with recent credit impairment																				
		cants that don't provide accurate & current information																				
• Loa	ns where	s where total outstanding liabilities are less than \$150,000.00																				
• Out	of date	statuto	ateme	ents	&/or p	oroof	of inc	ome	;													
• App	licants t	hat are	about	to beco	me s	elf e	mplo	yed														
	ns durin	_		J		r to	last p	rogre	ess pa	yme	nt											
	d only lo Iging/Re	-				orior	to the	e sale	9													
	en the se																					ome
of ti The administr	ne securi ative cos						•										nen	t had	d occ	urre	d.	
banking porta account # and																teres	t on	ly pe	eriod	is \$3	00.00	0 per
For validation	& securi	ity nurn	00ses. (Current :	e-m=	il ad	dress	& درب	rrent	moh	ile n	ımhe	r(s) =	re bo	oth n	nand [.]	at∩r	V				
i oi validation	S SECUII	, puip	. 0000.	Jan en i	~ 111d	au	€33	a cul			110	IDE	a رد ₎ .		er i I	. iui IU		,				
SECTION 3:	Annı	ual i	nco	me																		
Employer's name (in full):																						
Time with current employer	:	Ye	ears	and/or	•				Montl	ns			Y	ears'	a	ınd/o	r				M	onths
Status:		Full-tir	me			Pe	rman	ent p	oart-ti	me		F	ull-ti	me			() F	Perm	aner	it pa	rt-time
		Casual	I			Self-emp		ploye	oloyed			_ c	asua	ıl					Self-e	mplo	oyed	
Gross income (before tax):			\$,			,[\$, _				, _		
Gross overtime/penalties:				\$,									\$,		
Other income - pensions, FTB (before tax):					\$],[\$,		
Fully maintained company																						
Fully maintained company car:		Yes) No)					_ Y	'es				(No			
	ne follow		olicable	e docum	nents			urnin	ng the	forn	n to p			y del	ays.				No			
Car: Best to include the	ne follow	ring app				whe	en ret				•			y del	ays.			1	No			
Best to include the PAYG of Self- e		ving appees are i	require	ed to pr	ovide rs are	whee two	en ret o mos juired	t rec	ent p	aysli	ps	orever	nt an			ax re	turr			• bus	iness	s as
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SECTION 5:	Other loans, inclu	iding HECS & AT	0	
Name of financial institution:				
Loan Type (personal loan, car loan, lease, etc.):				
Monthly repayment:	\$	\$	\$	\$
Amount currently owing:	\$,	\$,	\$,	\$, , , , , , , , , , , , , , , , , , ,
SECTION 6:	Credit Cards, Store	cards, Interest fre	ee cards and After	· pay
Name of financial institution:				
	Visa	Visa	Visa	Visa
	MasterCard	MasterCard	MasterCard	MasterCard
	AMEX	AMEX	AMEX	AMEX
	Other	Other	Other	Other
Credit limit:	\$	\$	\$	\$
Amount currently owing:	\$	\$,	\$	\$
Usage:	Active ODormant	Active Dormant	Active Dormant	Active O Dormant
Cleared in full every month:	Yes No	○ Yes ○ No	Yes No	Yes No
SECTION 7:	Mortgage Street	loans		
Street number :				
Street address:				
State/Territory & Postcode:				&
Weekly rental income:	\$	\$,,,	\$,	\$, , , ,
SECTION 7a:	Jnencumbered (mortaage free) r	eal estate assets	
Street number:		mortgage free) i	ear estate assets	
Street address:				
State/Territory & Postcode:				8
Estimate "as is" value:		\$	\$	\$
Weekly rental income:	\$ \	\$	\$	\$
Percentage ownership on title	e:			
SECTION 7b:	Other assets			
Total combined superannuat	ion: \$,,			
Savings account and term de	posits			
Financial institution:				
Account number:				
Balance:	\$	\$	\$	\$

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VI.10 09 February 2022



SE	CTION 8: C	onclusion "offer & acceptance" will be made on ti	mely	return of cu	rent in	formation							
	Unable to assist; this assessment was based on your present situation; we would be glad to revisit if your situation changes.												
	See below for good news:												
Own	Owner occupied												
	P&I variable	%	\bigcirc	No thanks	or 🔘	Yes please							
	P&I fixed for	% for year(s)	\bigcirc	No thanks	or 🔘	Yes please							
	P&I fixed for	% for years	\bigcirc	No thanks	or 🔘	Yes please							
	P&I fixed for	% for years	\bigcirc	No thanks	or 🔘	Yes please							
	IO variable	% to years	\bigcirc	No thanks	or 🔾	Yes please							
	IO variable	% to years	\bigcirc	No thanks	or 🔘	Yes please							
	IO fixed	% for year(s)	\bigcirc	No thanks	or 🔘	Yes please							
	IO fixed	% for years	\bigcirc	No thanks	or 🔘	Yes please							
	IO fixed	% for years	\bigcirc	No thanks	or 🔘	Yes please							
Inves	tor loans												
	P&I variable		\bigcirc	No thanks	or ()	Yes please							
	P&I fixed for	% for year(s)		No thanks	or ()	Yes please							
	P&I fixed for	% for years		No thanks	or ()	Yes please							
	P&I fixed for	% for years		No thanks	or ()	Yes please							
	IO variable	to years		No thanks	or ()	Yes please							
	IO variable	to years		No thanks	or ()	Yes please							
	IO fixed	% for year(s)	\bigcirc	No thanks	or ()	Yes please							
	IO fixed	% for years	\bigcirc	No thanks	or ()	Yes please							
	IO fixed	% for years		No thanks	or 🔾	Yes please							
	Next Step: Return	to ratereview@mortgagestreet.com.au ASAP											
Sit back and watch it seamlessly happen if successful. There will be no changes to your loan other than a lower rate, nor are there any additional exit fees. Customer care will proceed to lower your rate now which ought to click over at your next repayment date, triggering a lower repayment for all subsequent months. They will also advise you of your new repayment amount(s)													