

- N- 4 0 N 4	Introducer company name:	Broker ID:
F 8044 - 2420	Primary contact:	e-mail:
OTTO NEW PRINCIPLE	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 state):								
\circ	Variable		Variable	\bigcirc	Variable	\bigcirc	Variable	
\circ	Fixed		Fixed	\bigcirc	Fixed	\bigcirc	Fixed	
\circ	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	This is what I would like to have (future state), subject to my acceptance:							
\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:	\bigcirc	Fixed for:	\bigcirc	Fixed for:	
	to years		to years		to years		to years	
I'd also like to speak to my broker about								
\circ	Purchase	\bigcirc	Construction	\bigcirc	Refinance	\bigcirc	Business	
\circ	Owner occupied	\bigcirc	Investment	\bigcirc	Property development	\bigcirc	Working capital	
For example: renovation, relocation, debt consolidation, school 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:	urrent address			
Address:				
State/Territory:	Postcode:			
How long have you been at this address?	Years and/or	Months		
Status:	Owner on title	Renting at	\$	per week
		Living with fa	amily/friends \$	per week
61		115		
	n would prevent an applicant from in arrears or hardship	n qualitying for a rate revi	ew today:	
• Applic	ants with recent credit impairme	ent		
	ants that don't provide accurate {			
	where total outstanding liabilities date statutory financial statemen		0	
	ants that are about to become se			
• Loans	during construction stages, prior	to last progress payment	:	
• Land	only loans prior to construction			
	ng/Relocation/Transition loans, pr			, lesh in in the color of come
of the	the security is about to be placed securities on the loan (partial disc	charge) a review would be	e deferred until after settleme	
banking portal i	ive cost of manually changing rate s \$100 per account # and/or a var or converting a loan from Investor	iation of the loan to conv	ert to or extend the Interest	only period is \$300.00 per
account # and/c	i converting a loan norminvestor	to Owner occupied (inclu	isive of face change).	
For validation &	security purposes: Current e-mail	address & current mobile	e number(s) are both mandat	ory
SECTION 3:	nnual income			
Employer's name (in full):				
Time with current employer:	Years and/or	Months	Years and/or	Months
Status:	Full-time	Permanent part-time	Full-time	Permanent part-time
Gross income (before tax):	Casual S	Self-employed	Casual \$	Self-employed
Gross overtime/penalties:	\$		\$	
Other income - pensions,	¢		<u> </u>	
FTB (before tax):	Ψ],	+	´
Fully maintained company	Ves	No	Ves	No
car:	Yes O	No when returning the form t	Yes to provent any delays	No
Best to include the	following applicable documents values are required to provide	when returning the form 1	to prevent any delays.	No
Best to include the PAYG en Self- em	following applicable documents of a ployees are required to provide a ployed corporate borrowers are	when returning the form to two most recent payslips required to provide last t	to prevent any delays.	
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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 Dormant	Active O 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 70:	In a pay maharad /	mortana fron	and actata accate	
SECTION 7a:	Jnencumbered (mortgage free) r	ear estate assets	
Street address:				
State/Territory & Postcode:				
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



SECTION 8: Conclusion "offer & acceptance" will be made on timely return of current information									
	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:								
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)									