

**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	\$
<b>TOTAL</b>	<b>\$</b>

**Liabilities**

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

**Annual Income**

Salary (pre-tax)	\$
Rental and dividends (pre-tax)	\$
Other income (details)	\$
Other (details)	\$
<b>TOTAL</b>	<b>\$</b>

**Annual Expenditure**

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

**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

Signature

Date

 /  / 

Borrower 2

Full Name

Signature

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)**