

**A. – Application details**

<b>Application type</b>	First Time Buyer Loan ___ New Home Loan ___ Building Loan ___ Further Loan ___ Switching Bond ___ Commercial Loan ___
-------------------------	---

**B. – Personal details**

	Applicant						Co-applicant / Spouse / Surety									
<b>Title</b>	Mr.	Mrs.	Miss.	Ms.	Dr.	Prof.	Mr.	Mrs.	Miss.	Ms.	Dr.	Prof.				
<b>First name(s)</b>																
<b>Surname</b>																
<b>Date of birth (ddmmyyyy)</b>							<b>Gender</b>	Male	Female					<b>Gender</b>	Male	Female
<b>ID/Passport no.</b>																
<b>S A Resident</b>	Yes	No	<b>Type of residency</b>		Temporary	Permanent	Yes	No	<b>Type of residency</b>		Temporary	Permanent				
<b>S A Citizen</b>	Yes	No	If no, specify nationality:				Yes	No	If no, specify nationality:							
<b>Race</b>	African		Asian		Coloured		White		African		Asian		Coloured		White	
<b>Preferred language</b>	Afrikaans		English		Other				Afrikaans		English		Other			
<b>Marital status</b>	Single		Married		Divorced		Widowed		Single		Married		Divorced		Widowed	
	If married, how?		ANC		COP		Traditional		If married, how?		ANC		COP		Traditional	
<b>Declared insolvent</b>	Yes	No	If yes, date:				Yes	No	If yes, date:							
<b>Been rehabilitated</b>	Yes	No	If yes, date:				Yes	No	If yes, date:							
<b>Physical address (street)</b>																
<b>Suburb</b>					<b>Code</b>						<b>Code</b>					
<b>Town/City</b>																
<b>Residential Status</b>																
<b>No. of Dependants</b>																
<b>Income Tax No</b>																
<b>Telephone no. (w)</b>	( )						( )									
<b>Telephone no. (h)</b>	( )						( )									
<b>Fax no.</b>	( )						( )									
<b>Cellular</b>	( )						( )									
<b>Email address</b>																

**C - Employment details**

	Applicant						Co-applicant / Spouse / Surety							
<b>Employment status</b>	Employed	Self-employed	Other:				Employed	Self-employed	Other:					
<b>Occupation</b>														
<b>Type of employment</b>	Permanent		Temporary		Contract		Permanent		Temporary		Contract			
<b>Service period (months)</b>	Length of service				Period of own business				Length of service				Period of own business	
<b>Type of income</b>	Salary	Wages	Other:				Salary	Wages	Other:					
<b>Name of Employer</b>														
<b>Employee number</b>														
<b>Employer address (street)</b>														
<b>Suburb</b>					<b>Code</b>						<b>Code</b>			
<b>Town/City</b>														
<b>Employer Telephone no.</b>	( )						( )							
<b>Previous Employer</b>														
<b>Previous Length of service</b>				(months)						(months)				

**D – Banking Details**

	Applicant						Co-applicant / Spouse / Surety					
<b>Account holder</b>												
<b>Bank name</b>												
<b>Account type</b>												
<b>Account no.</b>												
<b>Branch name</b>												

E- Financial details		Applicant		Co-applicant / Spouse / Surety	
Basic Salary	R			R	
Housing Allowance	R			R	
Car Allowance	R			R	
Cell phone Allowance	R			R	
Entertainment Allowance	R			R	
Commission	R			R	
Overtime	R			R	
Rental / Investments Income	R			R	
<b>Total Gross Salary</b> =	<b>R</b>			<b>R</b>	
U.I.F	R			R	
Income Tax	R			R	
Pension	R			R	
Medical Aid	R			R	
Rent (Exist)	R			R	
Water & Lights	R			R	
Transport Costs (Petrol etc.)	R			R	
Motor Vehicle Instalment	R			R	
Insurance (Life, Vehicle)	R			R	
Groceries & Clothing	R			R	
Domestic & Garden Services	R			R	
Education	R			R	
Entertainment	R			R	
Telephone & Cell phone	R			R	
Household Security	R			R	
Personal Loans	R			R	
Other	R			R	
Other	R			R	
<b>Total Monthly Expenses</b> =	<b>R</b>			<b>R</b>	

F – Home Loan details					
Type of offer	Offer to Purchase	Deed of Sale	Purchase price	R	
Deposit	R	Loan amount required	R	Future Use amount required	R
Loan term (years)			TOTAL REGISTERED AMOUNT	R	
Employer subsidised loan	Yes	No	Employer guarantee	Yes	No
Include transfer costs	Yes	No	Collateral amount	R	
Include initiation fees	Yes	No	Include bond registration costs	Yes	No
Group scheme	Yes	No	Group scheme number		

I – Switching bond details (from other institution)			
Institution name		Bond holder's name	
Bond account no.		Account balance	R

J – Property details					
Property type	Free standing property	Sectional title	Small holding	Vacant land	
Property use	Personal use	Rental stock	Investment	Holiday home	
Stand/Erf no.			Suburb		
Physical address (street)					
Town/City			Code		
Complex name			Sectional unit no.		
Contact person (valuation access)					
Cellular	( )		Telephone no.	( )	
Registered bond in the Name of:					

**K - Assets and Liabilities for Main-applicant**

	Full Description	Institution / Bank	Instalment Per Month	Total Value	Outstanding Balance
Fixed Property					
Vehicle 1					
Retail Account					
Credit Cards					
Investments					
Other (Specify)					
Other (Specify)					

**L - Assets and Liabilities for Co-applicant / Spouse / Surety**

Fixed Property					
Vehicle 1					
Retail Account					
Credit Cards					
Investments					
Other (Specify)					
Other (Specify)					

**M - Mortgage Plus Consent Declaration**

I/we confirm that I/we have read and understood this application.  
 (If not married by way of a duly registered Ante Nuptial Contract in terms of the laws of South Africa, then both spouses are to

I/We, the purchaser, hereby appoint Mortgage Plus as my sole agent to obtain mortgage loan finance from one or more of the registered banks ("the Bank") in South Africa for this property on my behalf.

I/We warrant that all the information I supplied is to the best of my knowledge and belief, true and correct in all material respects and I am not aware of any other information which, should it become known to the Bank, would affect the consideration of my application in any way.

I /We agree that the Bank can provide any information pertaining to the Loan applied for, sharing positive and negative information to Mortgage Plus during the application process.

I/We hereby authorise the Bank to have access to my credit bureau records, and to furnish or to disclose any information arising from any agreement entered into with the Bank to any such credit bureau.

**I/We confirm that I am not currently under debt review and am not subject to any debt rearrangement orders.**

I/We hereby authorise Mortgage Plus to supply my details to their exclusive business partners to enable them to provide me with tailored quotes for bond related products to suit my circumstances. My details will not be divulged to any other external parties other than referred to above, without the express consent of me/ourselves.

<b>Customer - Full Name/Surname</b>		<b>Customer - Full Name/Surname</b>
<b>Signature</b>		<b>Signature</b>
<b>Date (dd/mm/yyyy)</b>		<b>Date (dd/mm/yyyy)</b>

**Should any additional information be required, please do not hesitate to contact us !**

**Mortgage Plus Bond Originators**

Tel: 0861 1111 93  
 Tel: 011.327.4489



## N - Supporting Documentation Required for all applicants

### **Standard Documentation for all Applicants**

- Fully completed application form
- Copy of ID
- Proof of Income
- Assets and liabilities
- Income and expenditure
- 3 months bank statements / 6 months for commission earners

### **Self employed + Standard Documentation**

- Turnover for the past 12 months
- 6 months business statements to support turnover
- Proof of Income or letter from accountant
- 2 months updated Management accounts statements
- 6 months personal bank statement
- 3 years updated Financial statements

### **Close Corporation + Standard Documentation**

- Copy of ID from all members
- CK docs (founding statement)
- Proof of income
- Bank statements
- Financial statements (preferably audited)

### **Pty (Ltd) Company + Standard Documentation**

- Copies of ID's from all directors
- Proof of income (director)
- Audited financial statements\*
- Most recent financial statements required for CC's, Trusts and Pty's or else current management accounts must be provided\*

### **Trust + Standard Documentation**

- Copy of ID from all trustees
- Proof of trust document
- Proof of income (Trustee/s)
- Bank statements
- Financial statements (preferably audited)\*
- Must be supported by letter from bookkeeper or accountant\*

### **Documents Enclosed + Standard Documentation**

#### **Existing Residential - New owner**

- Offer to Purchase
- Existing account name and number

#### **Sectional Title**

- Offer to Purchase
- Management Agent Details

#### **Building Loan**

- Proof of stand purchase
- Copy of approved plans
- Detailed quote / Tender
- Minimum specifications / Schedule of finishes
- NHBRC certificate