|  |  |  |
| --- | --- | --- |
|  | **C:\Users\Debbie Worthington\Documents\Marketing\MC_Logo_H_POS_RGB July 2014.jpg Applicant 1 Applicant 2** | |
| **Surname:** |  |  |
| **First Name:** |  |  |
| **Mobile:** |  |  | |
| **Method of contact:** | Call | Text | Email |  | |
| **Email:** |  | | |
| **Address:** |  | | |
| **Security Address:**  **..…………………………………………………………………………………………..**  **Address after Settlement:** |  | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Lender** |  | | **Amount** | **$** | |
| **Loan No** |  | | **Product** |  | |
| **O/O *or*  INVEST P&I *or* I.O. FHOG: Y / N** | | **Proposed Settlement Date:** | | | **/ / Confirmed** □ |

***PURCHASE PRICE $ ORIGINAL TENDER AMT $ SIGNED CONTRACT AMT $***

**LOAN PURPOSE:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Refer to Jace: Yes / No Best time: Notes: Date Dynamics Lead Sent:**  **Refer to Allianz: Yes / No Date Referral Sent:** | | |
|  | **Checklist:** | **Date:** | **Notes:** |
|  | Compliance Check |  |  |
|  | Broker - Lender Code |  |  |
|  | NCCP Completed □  *Scanned* □ *Vaulted* □ *Registered* □ |  |  |
|  | Application Submitted □ *Scanned* □ *Vaulted* □ *Registered* □ Client Updated □ |  |  |
|  | Application received by Lender □  Sol □ Client Updated □ |  |  |
|  | FHOG Documents sent to Client Client Updated □ |  |  |
|  | Discharge Authority sent to Client Client Updated □ |  |  |
|  | Discharge sent to Lenders □ Client Updated □ Copy of Discharge sent to Solicitor if purchase □ | *Incoming Lender*  R □ | *Outgoing Lender*  R □ |
|  | Conditional Approval Sol □ Client Updated □ |  | **Expiry Date:** |
|  | Val Ordered Sol □ Est. Value $ Client Updated □ |  |  |
|  | Val Booked □ Val Back $ Sol □ Client Updated □ |  |  |
|  | Formal Approval *Comfort Letter* sent to sol (purchase only) □ Client Updated □ |  |  |
|  | Certificate of Currency/House Insurance | Client asked □ |  |
|  | FHOG sent to Lender *Signed* □ |  | *Approved* □ |
|  | Deposit Bond Required? Yes / No | *Ord* | *Received* □ |
|  | Documents sent by Lender Sol □ Client Updated □ |  |  |
|  | Documents received by Client Client Signed □ Sol □ |  |  |
|  | Documents received by Lender Sol □ Client Updated □ |  |  |
|  | Ready to Settle / Solicitor Updated □ FTC Authority □ Client Updated □ |  |  |
|  | Settlement Booked Client Updated □ |  |  |
|  | Settlement Complete Deb Called Client □ |  |  |
|  | Repayments Given to Clients Client Updated □ |  | Settlements register complete □ |
| *Address Updated □ Profile Updated □ Settled File Registered □ Opportunity Closed* □ | *Gift Sent □* |  |

**CONDITIONS:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------**Solicitor: …………………………………………...………………....... Phone: ……….……...……..… Fax: …..…..…………….......**

**Contact Name:............................................................... Email: …..…..…………….............................................................................**