

Home Loan Interview Form

You can complete and sign this form online. Ask your consultant for an online link.

New Loan	ualified Buyer's Certificate 🔲	
Section A: Personal details	Primary Applicant	Co-applicant ■ Surety ■
Title	Gender Male Female	Gender Male Female
First Name/s		
Surname		
Date of birth (dd/mm/yyyy)		
ID Type		
Refugee ID card number		
(dd/mm/yyyy) If passport, country of issue		
SA Citizen	Yes No C	Yes No No
Nationality		
City of birth		
Country of birth		
SA Permanent resident	Yes No C	Yes No
Are you a temporary resident of SA?	Yes No C	Yes No
Permit type	Permanent	Permanent
Permit number	Permit Expiry Date (dd/mm/yyyy)	Permit Expiry Date (dd/mm/yyyy)
Marital status	Single Married COP Married ANC Divorced Other	Single Married COP Married ANC Divorced Other
If married ANC, register in both names	Yes No No. of dependants	Yes No No. of dependants
If married, country of marriage		
Ethnic Group We are required to request this in terms of the Home Loan and Mortgages Disclosure Act, 2000.	Asian Black Coloured White	Asian Black Coloured White
SA Income tax number		
If tax number unavailable	No tax number available \(\text{No tax number issued }	No tax number available \(\text{No tax number issued } \text{\$\square} \)
Do you file any tax returns outside of SA?	Yes No	Yes No
If so, country and tax number		
Current residential status	Owner	Owner
Are you a first time home buyer?	Yes No 🗆	Yes No C
Will this property be your main residence?	Yes No C	Yes No C
Highest level of education		
Do you currently smoke, or have you smoked in the last 12 months any form of tobacco or e-cigarettes?	Yes No C	Yes No
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Are you a public official in a position of authority?	Yes No C	Yes No C
Are you related to or associated with a public official in a position of authority?	Yes No	Yes No
What is the nature of the relationship or association?		
Name and surname of public official in a position of authority that you are related or associated with.		
Section B: Contact Details	Primary Applicant	Co-applicant / Surety
Home number		
Cellphone number		
Work number		
E-mail address		
Fax number		
Home language		
Language for correspondence		
Residential Address		
		Same as primary applicant Yes No
Street		
Suburb		
City	Postal code	Postal code
Country		
Length at current address	Years Months	Years Months
Postal Address		
Same as residential address?	Yes No	Yes
Street / PO Box		
Suburb		
City	Postal code	Postal code
Country		
Legal notice delivery method	Hand delivered Registered mail	Hand delivered Registered mail
Contract and Address Batella Con	Fortuna Land Communication (Only to be considered	1:6.1:66
Contact and Address Details for	Future Legal Correspondence (Only to be completed	a ir different to postal address)
Street / PO Box		
Suburb		
City	Postal code	Postal code
Country		
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Section C: Employ	ment Det	ails	Primar	y Appli	icant		Co-applica	nt / Su	irety					
Occupation Status Full-time employed Self-employed Home Executive Pensioner	☐ Part-time employed ☐ Temporary employed ☐ Unemployed						Occupation Status Full-time employed Self-employed Home Executive Part-time employed Temporary employed Unemployed Pensioner							
Occupational Level Senior Management Management Supervisor		Skilled wo Semi-skille Unskilled		☐ Jun	ior position		Occupational level Senior Management Management Supervisor		S∈	xilled wo emi-skill nskilled	ed	□ Ju	nior p	oosition
Employment Details (Employed	l Only)												
Nature of occupation							Nature of occupation							
									[
Company registration no							Company registration no		l [
Employee number							Employee number		 					
Employment Period	Years		Mo	onths			Employment Period	Years				Months		
Street							Street							
Suburb							Suburb							
City							City							
Country							Country							
Postal code							Postal code							
	16	L	(:C)					1.6			/:5			
Percentage of income derive			,				Percentage of income derive						Ļ	
Are you a shareholder of you Percentage shareholding (if y		s business	or Y€	es 📙	No		Are you a shareholder of yo Percentage shareholding (if		oyer	s busine	essr	Yes [No _
Do you work in South Africa?			V	es \square	No 🗆		Do you work in South Africa					Vos [$_{\neg}$	No
Does this purchase coincide		nange?		es 🗌	No □		Does this purchase coincide		job ch	nange?		Yes [_ _	No
Were you previously employ	-	J		es 🗌	No \square		Were you previously emplo			J		Yes [No
Previous Employment [Details (Tv	wo Most	Recent) Prima	ary Applica	nt	Co-applica	nt / Su	irety					
Previous employer														
Duration Y	ears/		Months					Year	s			Months		
Previous employer														
Duration Y	/ears		Months					Year	s			Months		

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Section D: Credit History	Primary Applicant	Co-applicant / Surety
Are you currently under Administration?	Yes No	Yes No
Were you ever under Administration?	Yes No	Yes No 🗌
Has a judgement ever been taken against you?	Yes No	Yes No
Are you currently under debt review?	Yes No	Yes 🗌 No 🗌
Debt counsellor name		
Debt counsellor phone number		
Are you currently under any debt re-arrangement?	Yes No C	Yes 🗌 No 🗌
Have you ever been declared insolvent?	Yes No No	Yes No C
Date of insolvency (dd/mm/yyyy)		
If rehabilitated, date (dd/mm/yyyy)		
Are you aware of any adverse credit listings?	Yes No	Yes No C
If yes, specify		
Are you currently in a credit bureau dispute?	Yes No No	Yes No
Existing Suretyships	Primary Applicant	Co-applicant / Surety
Are you bound by any surety agreements?	Yes No	Yes No C
If yes, specify amount*		
Are you currently paying this account?	Yes No No	Yes No C
Monthly Instalment		
Details of suretyship		
Details of suretyship Will you be settling this account/debt?	Yes No	Yes No
	Yes No	Yes No D
Will you be settling this account/debt? New Instalment (only capture if	Yes No	Yes No
Will you be settling this account/debt? New Instalment (only capture if Instalment / payment will be reduced)	Yes No	Yes No
Will you be settling this account/debt? New Instalment (only capture if Instalment / payment will be reduced) Surety in favour of * If bound by multiple surety agreements then		Yes
Will you be settling this account/debt? New Instalment (only capture if Instalment / payment will be reduced) Surety in favour of * If bound by multiple surety agreements then combine the values.	nils	Yes No Dan Instalment Debit Order Details
Will you be settling this account/debt? New Instalment (only capture if Instalment / payment will be reduced) Surety in favour of * If bound by multiple surety agreements then combine the values. Section E: Loan and Debit Order Details	nils	an Instalment Debit Order Details
Will you be settling this account/debt? New Instalment (only capture if Instalment / payment will be reduced) Surety in favour of * If bound by multiple surety agreements then combine the values. Section E: Loan and Debit Order Details Erf number / Section number	ills Home Loa	an Instalment Debit Order Details
Will you be settling this account/debt? New Instalment (only capture if Instalment / payment will be reduced) Surety in favour of * If bound by multiple surety agreements then combine the values. Section E: Loan and Debit Order Details Erf number / Section number Street / Complex Suburb	Home Loa Bank Nam Bank Acco	an Instalment Debit Order Details

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Section F: Mor	nthly Inc	ome, Dec	ductions	and Exp	enses								
Monthly Income	Primary	Applicant	t Co	-applica	ant / Sur	ety			Prim	ary Appl	icant	Co-ap	plicant / Surety
Gross salary R			R				Entertainment al	lowance	R			R	
Average commission R			R			ı	ncome from sure	eties	R			R [
Investment income R			R			l	Housing subsidy		R			R [
Rental income R			R				Maintenance/ ali	•	R			R [
Car allowance R			R				Average overtime (past 6 months)	9	R			R [
Travel allowance R			R										
	F	rimary A _l	pplicant					Co-	applicar	t / Suret	У		
Other income description	on				R							R	
Other income description	on				R							R	
Total income					R			Tota	al income			R	
Monthly Deduction	ıs Pı	rimary Ap	plicant		Co-a	applica	ant / Surety		Р	rimary A	pplicant	Co-ap	plicant / Surety
Tax (PAYE/SITE)	R				R			UIF	ı	R		R	
Pension	R				R			Med	ical Aid	R		R	
	F	rimary A _l	pplicant					Co-	applicar	it / Suret	:V	J [
Other deductions descrip			· •		R					·	,	R	
Other deductions descrip	ption				R							R	
Total deductions	R			come afte	r R			R				R	
Monthly Expenses	Pr	imary Ap	plicant	Co-	applican	nt / Sui	rety	P	rimary <i>i</i>	Applicant	t Co-	-applica	ant / Surety
Rental (only if ongoing)	R			R [Transport,	•	nd car R			R [
Maintenance / Alimony	R			R [Education		R			R [
Rates and taxes / Levies	R			R [Medical (ex		ical aid R			R	
Water and electricity	R			R			Cellphone on contract	/ interne	et (if not R			R	
Assurance (life, retireme annuities, insurance and				R			M-Net, DS1	•	V R			R	
funeral policies) Groceries	R			R			Security		R			R	
Pi	rimarv A	pplicant		L				C	Co-applio	ant / Su	retv	L	
Other expenses description	•			R [Other expe			•	•	R [
Other expenses description				R [Other expe	nses				$R\left[\right.$	
		1	Not aur-	luc 「			Takel			1	Not arrest		
Total expenses			Net surplincome /				Total expenses				Net surpl income /		
_													
Signed Primary applicant							Signed Co-applicar Surety	nt /					
Date (dd/mm/yyyy)							Date (dd/mn	n/yyyy)					

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Section G: Primary Trai	nsacional			etalls An oplicant	u C01		xpens		pplicant /	Surety			
Bank / Financial Institution						Bank ,	[/] Financi	al Institutio	n				
Branch						Branch	ı						
Account type (only cheque or saving	gs)					Accou	nt type ((only chequ	e or savings)			
Account holder name						Accou	nt holde	er name					
Is this account in the name of the L	egal Entity?		Yes	☐ No		Is this	account	t in the nam	e of the Leg	al Entity?	Yes		No 🗌
Business bank account?			Yes	☐ No		busine	ess bank	account?			Yes		No 🗌
Account number						Accou	nt numb	oer					
Balance Debit (-) Credit (+)						Baland	ce Debit	(-) Credit (+	-)				
For FNB, RMB and Standard Bank P a period of time. I consent to this a		Customers (Only: You Yes	_	equest	l ed the opport	unity to	consider yo	our home loa	an applicat	ion first	_	No \square
Home Loans		Pri		plicant				Co-a	pplicant /	Surety			
	Ac	count 1			ount 2			Account 2			Accoun	t 2	
Bank / Financial Institution													
Branch													
Account holder name													
Outstanding balance													
Monthly installment/ Minimum payment													
Are you selling the existing propert	y?	Yes	No 🗌		Yes [No 🗆		Yes	No		Yes		No 🗌
New installment (if reduced)													
Other Bank / Finance Accou	Int Details (ehicle fina		personal lo			opplicant	his a Busir	iess Is	this a L	_egal
,								be settle		count?	Eı	ntity ac	count?
								Yes 🗌	No 🗌 Y	es 🗌 No) [Ye	es 🗌	No 🗌
								Yes 🗌	No 🗌 Y	es 🗌 No) [Ye	es 🗌	No 🗌
								Yes 🗌	No 🗌 Y	es 🗌 No) [Ye	es 🗌	No 🗌
								Yes 🗌	No 🗌 Y	es 🗌 No) [Ye	es 🗌	No 🗌
Co-applicant / Surety													
Bank / Financial Institution	Account	type	Curi	ent Balance		Monthly Pa	yment	Will this be settle	account Is t d? acc	this a Busir count?		this a L ntity ac	Legal count?
								Yes 🗌	No 🗌 Ye	es 🗌 No	☐ Ye	s 🗌	No 🗌
								Yes 🗌	No 🗌 Ye	es 🗌 No	☐ Ye	s 🗌	No 🗌
								Yes 🗌	No 🗌 Ye	es 🗌 No	☐ Ye	s 🗌	No 🗌
								Yes 🗌	No 🗌 Ye	es 🗌 No	☐ Ye	s 🗌	No 🗌
Retail Accounts	Primar	y Applicar	nt			Со	-applic	cant / Sur	etv				
Name of Retail Store	Current Balance	Monthly Payment	Will	this account	Na	me of Retail S		•	Current Balance	Mont Paym		ill this e settle	account
	Dalance	гауппепс	Yes 🗌						Datatice	rayiii			No 🗌
			Yes 🗆	No 🗆								s 🗌	No 🗆
]								=		
			Yes	No 🗌									No 🗌
			Yes 🗌	No 🗌							Ye	s 🗌	No 🗌
	n H		Yes 🗌	No 🗌							Ye	s \square	No 🗌

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Section H: Asse	ets & Liabilities	Pr	imary	Applicant				Co-applican	applicant / Surety				
		Market Va	lue	Liabilities	s				Market Value		Liabilit	ies	
Fixed property	R		R					R		R			
Vehicles	R		R					R		R			
Investments	R		R					R		R			
Furniture & fitting	gs R		R					R		R			
Description		Market Va	lue	Liabilities	S	Descriptio	n		Market Value		Liabilit	ies	
Other assets / liabil	lities					Other assets	/ liabilities						
	R		R					R		R			
	R		R					R		R			
	R		R					R		R			
	R		R					R		R			
Total Assets / Liabi	lities	Total Liabilitie	s	Net Asset Valu	ıe	Total Assets	/ Liabilities		Total Liabilities		Net Asset V	alue	
Total Assets R	R		R			Total Assets F	3	R		R			
Section I:				Declarat	tion <u>s</u> a	ınd Consent	:S						
or any third party. n) Consent, after my mortgage bond is registered, to receiving estate planning advice of a free Will and to explore any changed insurance requirements. I/we are aware that I/we can opt out at any time.											m the d redit. y/our ntion No \[\frac{1}{4} \]		
o) I/We, the undersigned, consent to ooba making application to the NHFC on my/our behalf for FLISP and for ooba to receive all communication from the NHFC pertaining to my/our FLISP application, including the final outcome of my/our application. I/We understand the purposes for which my/our personal information is required and for which it will be used by ooba and the NHFC.													
Section J: Your data priva	acy is important to	us		D	ata P	rivacy							
While we will n interest you. Re Primary Applica • Yes please,	ot share your perso emember, you can	onal informatior opt out at any ti p to date on you	me. ur offers	s and services	s] •	econdary Appl Yes please, I	on the latest informa icant: 'd like to be kept up t don't want to hear a	o dat	e on your offers and	l ser	vices 🗌	ould	
Cione a d						iano d							
Signed	Primary applicar	nt] 5	igned	Co-applicant / Sur	ety					
Date			(dd/mm/s	ууу)	[Date			(dd/mm/yyyy)				

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