01 | Applicant Information & Loan Request

Date of application

Full legal name

Date of birth

Nationality / citizenship

NIB number (if required)

Email address

Home / work / mobile telephone

How did you hear about us?

Marital status

☐ Single ☐ Married ☐ Common-law ☐ Divorced ☐ Widowed

☐ Separated

Number of dependants

RESIDENCE

Present residential address / city

Postal address (if different)

Length of time at address

Housing arrangement

☐ Own ☐ Rent ☐ Mortgage ☐ Living with family ☐ Other

Monthly rent / mortgage payment

Previous address (if less than 3 years)

FINANCING REQUEST

Amount of loan requested (B$)

Purpose of loan / intended use

Preferred loan term / proposed repayment

Loan type

☐ Personal ☐ Vehicle ☐ Mortgage ☐ Business ☐ Debt consolidation

☐ Other

02 | Employment, Income & Financial Commitments

CURRENT EMPLOYMENT

Employment type

☐ Permanent ☐ Contract ☐ Self-employed ☐ Government ☐ Private sector

☐ Other

Present employer / business name

Job title / position

Employment start date / length of service

Gross monthly income (B$)

Net monthly take-home pay (B$)

Additional monthly income / source

Salary payment bank / credit union

Salary frequency (weekly / biweekly / monthly)

Previous employer within last five years

Length of previous employment

MONTHLY HOUSEHOLD EXPENSES & DEBTS

Rent / mortgage / utilities (B$ monthly)

Groceries / transportation / childcare (B$ monthly)

Child support / other commitments (B$ monthly)

Existing loans / credit card repayments (B$ monthly)

Other recurring expenses (B$ monthly)

EXISTING CREDIT FACILITIES

Bank / lender, original loan amount, outstanding balance

Bank / lender, original loan amount, outstanding balance

Monthly repayments / arrears, if any

Previous loan refusal, arrears or repossession?

☐ No ☐ Yes — explain in supporting notes

03 | Spouse, References, Insurance & Security

SPOUSE / PARTNER — COMPLETE IF APPLICABLE

Spouse / partner full name

Spouse occupation / employer

Spouse monthly income / length of employment

Spouse email / telephone

REFERENCES

Reference 1 — name / relationship / employer

Reference 1 — telephone / residential address

Reference 2 — name / relationship / employer

Reference 2 — telephone / residential address

Reference 3 — name / relationship / employer

Reference 3 — telephone / residential address

INSURANCE & ASSETS

Do you have an existing insurance policy?

☐ Yes ☐ No

Insurer / agent / policy type (if applicable)

Face value / cash value (if applicable)

Vehicle make / model / year / insurance expiry

Savings / cash security available (B$)

Property or other collateral (if applicable)

CO-SIGNER / GUARANTOR — IF APPLICABLE

Co-signer name / relationship / contact

Co-signer employment / income / bank

Co-signer existing loans / security offered

04 | Document Checklist, Declarations & Consent

DOCUMENTS AVAILABLE

Select documents provided

- ☐ Passport / government ID
- ☐ NIB card
- ☐ Job letter
- ☐ Recent payslips
- ☐ Bank statements
- ☐ Proof of address
- ☐ Loan quotations
- ☐ Insurance records

Additional documents

- ☐ Business licence
- ☐ Financial statements
- ☐ Existing loan statements
- ☐ Property / vehicle documents
- ☐ Other

OUTSTANDING INFORMATION

Other documents required / comments

Preferred lenders to be contacted

APPLICANT ACKNOWLEDGEMENT

I confirm that the information I provide is accurate to the best of my knowledge.
I understand that M.S. Deal & Associates LLC provides application packaging and liaison support only; it is not a lender and cannot guarantee loan approval or lending terms.

SEPARATE AUTHORIZATION FOR LENDER DISCLOSURE

I authorize M.S. Deal & Associates LLC to share my application information and relevant supporting documents with the financial institutions I approve for eligibility assessment, referral and application review. I may withdraw this authorization for future disclosures by notifying the company in writing, subject to disclosures already made.

Consent to disclose documents to approved lenders

- ☐ I authorize
- ☐ I do not authorize

Applicant typed name

Date of acknowledgement

OFFICE USE ONLY

Application status / assigned officer

Lender contact / next action / follow-up date

Do not provide passwords, card PINs, online banking access or one-time verification codes.