

Annuity Plus Reverse Mortgage Application

Please print clearly. ALL questions must be answered. Incomplete applications may cause delays.
Establishment and credit fees and charges applicable on all loans.

What is your preferred option? (tick preferred option)

1

<input type="checkbox"/> Regular Advance -	Amount requested as a monthly advance	\$	
<input type="checkbox"/> Lump Sum & Regular Advance -	Initial lump sum	\$	Balance as a monthly advance \$
<input type="checkbox"/> Lump Sum Only -	\$	What are the funds primarily being used for? <small>(eg. travel, home maintenance, medical)</small>	

Do you have dependent children? Yes No Do you have a will? Yes No

Applicant(s) Details

2

Applicant Name

Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Other	
Surname		
Given Names		
Date of Birth	Drivers Lic No.	

Joint Applicant Name (if applicable)

Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Other	
Surname		
Given Names		
Date of Birth	Drivers Lic No.	

Married De Facto Single Widowed Divorced Separated

Contact Details

Phone	Home	Mob	Fax	Email
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Details of Your Next of Kin

Name		Telephone
Address		
Name		Telephone
Address		

Property Details

3

Address	Street		
	Suburb	State	Postcode

How long have you lived at this address? Home fully owned Home has mortgage

Title details of the property	Volume No.	Folio No.
In whose name(s) is the title?		

Property Insured with	Insurance Company
Policy No.	Expiry Date / / Amount Insured \$

Is this your primary residence? Yes No (If no, please state your current residential address below)

Income & Expenditure (tick where applicable)

4

Are you in receipt of:-

- Superannuation \$ p/fortnight
- Pension (Govt) \$ p/fortnight
- Wages/Salary \$ p/fortnight
- Job Search \$ p/fortnight
- Other \$ p/fortnight

Superannuation Details

5

Who is your superannuation with?

- Fund 1
 Value \$
- Fund 2
 Value \$
- Fund 3
 Value \$

Financial Details

6

Liabilities

Mortgage(s) on Your Home		\$
Lenders Name	Amount Owng	M'thly Payments
	\$	\$
	\$	\$

Hire purchase, personal loans, credit cards and similar regular commitments

Lenders Name	Credit Limit	Amount Owng	M'thly Payments
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

Assets

Estimated Value of Your Home \$

Other Property (Specify house, flat, vacant land)

Address	\$
Address	\$

Motor Vehicle(s)

Year/Make	Model	Reg No.	\$
			\$

Bank deposits/investments	\$
Boat	\$
Caravan	\$
Furniture	\$
Other	\$

Banking Details (If other than Transcomm. Please provide banking details for payment advice)

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Bank/Building Society/Credit Union Name	<input type="text"/>	Branch (BSB)	<input type="text"/>
Account Name	<input type="text"/>		
Branch Address	<input type="text"/>		

I/We have read and understood the particulars which have been completed in this form and declare that they are true and complete and have been made available to you to enable you to determine whether or not to provide a loan.

I/We hereby authorise you to make such enquiries of any person or corporation as deemed appropriate in verification, confirmation or amplification of any of the within statements and particulars.

I/We acknowledge that I/we have received, read and understood the Product Information Document and Privacy consent.

I/We apply to be admitted as a member of Transcomm Credit Co-operative Ltd and agree to be bound by the Constitution, and any amendments thereof in accordance with Corporations Law.

X Signature

X Joint Applicants Signature

Date / /

Transcomm Credit Union Privacy Disclosure and Consent

(version CR)

We collect personal information about you. We are required to comply with the Financial Transactions Reports Act by collecting information about your identity. In addition, we collect your personal information to provide you with information that we are by law required to give you, to provide you with products or services you have requested, and to assess an application for a product or service, including a credit facility, and provide it to you if the application is approved. We also use your personal information to provide you with information about our products and services.

From 21 December 2001, you will be able in most cases to gain access to your personal information, by contacting us using the contact details below.

In order to assess your application for a product or service including a credit facility, or to provide it once approved, we may need to disclose your personal information to our mortgage insurer, our valuer, our solicitors, our law stationer, credit reference association and our mailing house.

We only collect the personal information necessary to comply with the law and to provide you with the products and services you request. If you fail to provide us with your personal information, we may be unable to provide you with the products and services you have requested. If you have made an application for a product or service including a credit facility, we may be unable to assess your application or to provide you with the product or service if the application is approved. We may also be unable to provide you with information about our products or services.

We also use your personal information to provide you with information about other products and services we or companies within our group offer, and for other purposes including the direct marketing of these and other products and services which we may offer from time to time. We also keep your application form and any financial records of our dealings with you.

Your consent:

Please tick this box if you consent to us using and disclosing your personal information.

Signature(s)		
Name(s)		Date

You can contact us:

Transcomm Credit Co-operative Ltd t/as Transcomm Credit Union
ABN 54 087 651 750 AFSL 245 606
99 King Street, Melbourne VIC 3000 Telephone 03 9629 4484 Fax 03 9629 4130
Email: enquire@transcomm.com.au or loans.dept@transcomm.com.au

OFFICE USE ONLY

Application No.

Date

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