



COCOLIFE

COCOLIFE Building, No. 6807 Ayala Avenue Makati City 1226
Tel. No. 812-9015 Fax No. 812-9053

LOAN APPLICATION FORM

NAME (Surname)		(First Name)	(MI)	DATE OF BIRTH		AGE	CIVIL STATUS
TIN		SSS/GSIS NO.		HDMF NO.		MOBILE NO.	
RESIDENTIAL ADDRESS						LANDLINE NO.	
() OWNED () RENTED							
E-MAIL ADDRESS				<u>SOCIAL MEDIA</u> FACEBOOK : _____ TWITTER : _____			
NAME OF EMPLOYER							
BUSINESS ADDRESS						OFFICE TEL. NO.	
BUSINESS OR PROFESSION				POSITION		LENGTH OF SERVICE	
NAME OF SPOUSE (Surname)		(First Name)	(MI)	DATE OF BIRTH		AGE	CIVIL STATUS
TIN		SSS/GSIS NO.		HDMF NO.		MOBILE NO.	
E-MAIL ADDRESS				<u>SOCIAL MEDIA</u> FACEBOOK : _____ TWITTER : _____			
NAME OF EMPLOYER							
BUSINESS ADDRESS						OFFICE TEL. NO.	
BUSINESS OR PROFESSION				POSITION		LENGTH OF SERVICE	
LIST OF DEPENDENTS		RELATIONSHIP	DATE OF BIRTH/AGE		EMPLOYER /SCHOOL – LEVEL - COURSE		
1)							
2)							
3)							
4)							

LOAN PARTICULARS

PURPOSE OF LOAN		AMOUNT OF LOAN			DESIRED TERM OF LOAN (not to exceed 15 years)	
<input type="checkbox"/> Purchase of an existing residential unit <input type="checkbox"/> Lot purchase and construction of residential unit <input type="checkbox"/> Construction of residential unit <input type="checkbox"/> Renovation / Expansion of existing residential unit <input type="checkbox"/> Others : _____		Project Cost/TCP _____ Equity/Downpayment _____ LOAN AMOUNT _____				
LOCATION		TCT/CCT No.			LAND AREA IN SQ. M.	
REGISTERED OWNER		ASSESSED VALUE OF LAND			MARKET VALUE OF LAND	
DESCRIPTION OF IMPROVEMENTS		NO. OF STOREYS	TOTAL FLOOR AREA (SQ. M.)	YEAR CONSTRUCTED	ASSESSED VALUE	MARKET VALUE
EXISTING						
PROPOSED						

MONTHLY INCOME			MONTHLY EXPENSES (combined for borrower & spouse)			
	Borrower	Spouse				
Salaries			<u>Food/Groceries</u>	_____	<u>Insurance Plans</u>	_____
Allowances			<u>Utilities</u>	_____	Life Ins. Premiums	_____
Commissions			Electricity	_____	Non Life Premiums	_____
Others			Water	_____	HMO	_____
TOTAL			Telecommunication	_____	Others	_____
			Cable	_____	<u>Loan Amortizations</u>	_____
			Internet	_____	Housing Loan	_____
			<u>Household Help</u>	_____	Car Loan	_____
			<u>Educational</u>	_____	Personal Loan	_____
			Tuition Fees	_____	<u>Transportation</u>	_____
			Books	_____	Gas	_____
			School Supplies/Uniform	_____	Parking	_____
			Allowances	_____	Maintenance	_____
			<u>Personal</u>	_____	Fare Allowance	_____
			Clothing	_____	<u>Others (pls specify)</u>	_____
			Personal Care	_____		_____
			Leisure/Hobbies/Travel	_____		_____
			<u>Health and Wellness</u>	_____		_____
			Medical/Dental	_____		_____
			Medicines/Supplements	_____		_____
TOTAL COMBINED INCOME _____			TOTAL MONTHLY EXPENSES _____			

DETAILED ASSETS

Bank Accounts

BANK	BRANCH	ACCOUNT TYPE	ACCOUNT NO.	BALANCE
TOTAL				

Money Market Placements

ISSUER	TYPE OF INSTRUMENT	MATURITY DATE	AMOUNT	TERMS (No. of days, rate)
TOTAL				

Stocks and Bonds Owned

DESCRIPTION	FACE VALUE NO. OF SHARES	ACQUISITION COST	PRESENT MARKET VALUE	TO WHOM PLEDGED
TOTAL				

Life and Property Insurance (including Spouse and Dependents)

COMPANY	TYPE OF COVERAGE	POLICY NO.	EFF. DATE	FACE AMOUNT	ANNUAL PREMIUM
TOTAL					

Real Estate owned aside from those offered as collaterals

LOCATION	(Residential / Commercial / Agricultural)	MARKET VALUE	ENCUMBRANCES	ANNUAL INCOME (IF ANY)
TOTAL				

Automotives Owned

MAKE/TYPE	YEAR MODEL	BOOK VALUE
TOTAL		

DETAILED LIABILITIES

Credit Card Accounts

ISSUER	CREDIT LIMIT	OUTSTANDING BALANCE
TOTAL		

Existing Loans

CREDITOR / ADDRESS	DATE GRANTED	MATURITY DATE	COLLATERAL	MODE OF PAYMENT	AMORTIZATION	AMOUNT GRANTED	BALANCE AS OF _____
TOTAL							

STATEMENT OF ASSETS, LIABILITIES AND NET WORTH (SUMMARY)

ASSETS	AMOUNT	LIABILITIES	AMOUNT
Cash on hand		Outstanding Credit Card Due	
Cash in bank		Housing Loan	
Money market placements		Car Loan	
Stocks and bonds		Personal Loan	
Life Insurance - cash surrender value		Other debts - itemize	
Real estate - acquisition cost less depreciation		TOTAL LIABILITIES (B)	
Automotive (net book value)			
Others - itemize			
TOTAL ASSETS (A)		NET WORTH (A-B)	

Credit References

NAME	ADDRESS	CONTACT NO.	RELATIONSHIP

Kindly use this portion to sketch your residential address

Certification

I/We certify that the foregoing information/statements are, to the best of my/our knowledge, true, correct and complete and I/We hereby agree that any misrepresentation of a material fact is a ground for disapproval of the application, cancellation of the loan, or, foreclosure of the mortgage as the case may be.

I/We further fully agree that the processing of this application is subject to the lending policies of UNITED COCONUT PLANTERS LIFE ASSURANCE CORPORATION.

Date

Signature over Printed Name

Date

Signature over Printed Name

Authorization to furnish credit information

I hereby authorize any person, organization, or entity that has any record or knowledge of my financial condition and/or that _____ to give to UNITED COCONUT PLANTERS LIFE ASSURANCE CORPORATION or any party who may purchase any loan obligation which I may have with UCPLAC any and all information that they may require in connection with my loan application.

Date

Signature over Printed Name

Date

Signature over Printed Name

Checklist of Requirements (to be submitted together with completely filled out Application Form

*if married or with co-borrower, please submit each applicable requirement form the spouse/co-borrower

Date Received

- | | |
|--|-------|
| <input type="checkbox"/> One 2x2 Picture of Borrower/s | _____ |
| <input type="checkbox"/> Certificate of Employment and Compensation | _____ |
| <input type="checkbox"/> Three (3) Months Latest Payslip | _____ |
| <input type="checkbox"/> Income Tax Return - last three (3) years | _____ |
| <input type="checkbox"/> Bank Statements | _____ |
| <input type="checkbox"/> Copy of latest billing statement (Meralco/Credit Card) | _____ |
| <input type="checkbox"/> Audited Financial Statement and Income Tax Return - last three (3) years (if self employed) | _____ |
| <input type="checkbox"/> In House Financial Statement - last three (3) years (if self employed) | _____ |
| <input type="checkbox"/> Photocopy of two (2) valid government issued ID (SSS, TIN, Passport, Voter's ID, etc) | _____ |
| <input type="checkbox"/> Marriage Certificate (if married) | _____ |
| <input type="checkbox"/> Resume | _____ |
|
 | |
| <input type="checkbox"/> Photocopy of TCT of the property to be financed/offered as collateral | _____ |
| <input type="checkbox"/> Photocopy of Tax Declaration (land and improvements) | _____ |
| <input type="checkbox"/> Photocopy of Latest Real Estate Tax Receipt with Tax Clearance | _____ |
| <input type="checkbox"/> Lot Plan and Vicinity Map certified by the Bureau of Lands/Geodetic Engineer | _____ |
| <input type="checkbox"/> Floor Plan | _____ |
| <input type="checkbox"/> Offer To Sell/Contract to Sell | _____ |
| <input type="checkbox"/> Statement of Account (for loan take out) | _____ |
|
 | |
| <input type="checkbox"/> Floor Plan/Building Plan (if purpose is house construction) | _____ |
| <input type="checkbox"/> Bill of Material (for house construction) | _____ |
|
 | |
| <input type="checkbox"/> Others: _____ | _____ |