

## Contact details

Key contact name

Business name

Mobile

Email

## Section 1. Borrowing requirements

Purpose of funds and impact to the business/customer

Purchase price (if applicable and incl. GST)

Deposit

Refinance amount (if applicable)

Expected settlement date

Amount to be financed

Supplier details (if applicable)

## Section 2. Security

### Security Item 1

What supporting security is being offered?

Address

Estimated value

Loan linked (if applicable)

### Security Item 2

What supporting security is being offered?

Address

Estimated value

Loan linked (if applicable)

## Section 3. Income

### Customer/vendor financials

Sales

Interest

Depreciation

Other significant addbacks

Net profit

## Section 3. Income (cont.)

Other future income (e.g. rental income)

## Section 4. Client objectives

**What is important to your client? Number these items from 1-6, 1 being the most important.**

Small deposit required

Longest loan term

Best rate

Must be with a major

No annual reviews

Must be a low-doc

## Section 5. Applicant information

	Yes	No		Yes	No
Are you up-to-date on your GST, superannuation, and tax payments?			Have any of the borrowers/directors ever been declared bankrupt?		
Are all individuals permanent Australian citizens?			Do you have financial statements available for at least one financial year?		
Have any of the borrowers/directors had any adverse credit history?			Do the borrowers or guarantors own property?		
Is any legal action pending?			How many years have you had an ABN?		

	Yes	No
Are the goods being purchased replacing an existing asset with a loan against it?		
<b>If Yes, complete below section</b>	<b>If No, do not complete</b>	

	Yes	No
Is the customer willing to sign a self-declaration that they have the financial capacity to meet this commitment and no other finance has been taken?		
Customers Organisation structure (directors) has remained unchanged in last 12 months?		
The proposed borrower and guarantors are the same as the contract being replaced?		
Asset/s being replaced is/are similar in nature and used in the same industry?		

Existing financier	Existing contract number/identifier	Original purpose of funds
Started (date)	Finished (date)	Initial amount financed
Existing monthly payments		