

Business Lending Application

Full names of the borrowers

Surname	Given names (unless a corporate entity)	ABN (if applicable)

If the borrower is a corporate entity, please list all directors (and shareholders if less than 10)

Surname	Given names	Status (eg directors/secretary /shareholder)	ABN (if applicable)

Is the applicant a part of a group of companies or partnerships?

Yes ☐ No ☐

If yes, please provide details of relationships –

Business Lending Application

Is the borrower acting as a trustee for a trust of any kind?

Yes ☐ No ☐

If yes, please provide details of the trust

Trust name	
Unit holders or beneficiaries	1.
Please attach list if more than four beneficiaries	2.
	3.
	4.

Is the applicant an existing member of Summerland Bank?

Yes ☐ No ☐

If yes, please provide members number/s	

Are there any other associated accounts with Summerland Bank?

Yes ☐ No ☐

If yes, please provide members account number/s	

What is the current trading or operational address of the business?

Business Lending Application

Does the business currently operate from leased premises?

Yes ☐ No ☐

If yes, what are the lease terms?

Lessor	Rental \$ per	Term	Expiry

If the purpose of the loan includes the acquisition of new business premises, then what is the proposed trading or operational address of the business?

Will the applicant be leasing these premises?

Yes ☐ No ☐

If yes, what are/will be the lease terms?

Lessee	Rental \$ per	Term	Expiry

How long has the business been established?

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How long have the current owners owned the business?

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What is the nature of the business?

Business Lending Application

How many staff, apart from the owners, will the business employ?

Full time	
Part time	
Casual	
Total	

Who are the main competitors to the business?

Who are the major suppliers to the business and what is their estimated % of reliance?

Supplier	% of the business

Who are the major customers (buyers) and what is their estimated % of the business?

Customer (buyer)	% of the business

Details of the existing/proposed finance leases

Lessor	Expiry	Payments	Balance	Residual

Business Lending Application

Is there any external income available to the applicant(s)

Yes ☐ No ☐

If yes, please provide details –

Source	Frequency	Gross amount

Funds required

Purchase price*	\$
Acquisition costs (legals, stamp duty etc)	\$
Sub-total	\$
Other purposes (please detail)	\$
Total funding required	\$
Less borrower's contribution	\$
Loan required	\$

*Details of purchase price

Real estate	\$
Stock	\$
Furniture and Fittings	\$
Plant and Equipment	\$
Goodwill	\$
Motor vehicles	\$
Total	\$

Business Lending Application

Make any other comments here (or attach additional sheets)

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Business Lending Application

ANNEXURE A TO BUSINESS LOAN APPLICATION

Personal details of directors /shareholders /business partners

Status (circle)	Borrower /director /shareholder 1	Borrower /director /shareholder 2
Surname		
First names		
Date of birth		
Marital status		
Number of dependants		
Driver licence no.		
Phone (home)		
Phone((work)		
Phone (mobile)		
Fax		
Email address		
Residential address		
Years at address		
Status	Owned ☐	Owned ☐
	Mortgaged ☐	Mortgaged ☐
	Renting ☐	Renting ☐
Previous address (if less than 3 years at current address)		
Years at address		
Postal address		
Current employment details	Self employed ☐	Self employed ☐
	Full time employee ☐	Full time employee ☐
	Part time employee ☐	Part time employee ☐
	Casual employee ☐	Casual employee ☐
	Unemployed ☐	Unemployed ☐
	Domestic duties ☐	Domestic duties ☐
Occupation		
Length of employment		
Net or gross income	Net \$ per	Net \$ per
	Gross \$ per	Gross \$ per
Previous employment details	Self employed ☐	Self employed ☐
	Full time employee ☐	Full time employee ☐
	Part time employee ☐	Part time employee ☐
	Casual employee ☐	Casual employee ☐
	Unemployed ☐	Unemployed ☐
	Domestic duties ☐	Domestic duties ☐
Occupation		
Length of employment		

Business Lending Application

ANNEXURE B TO BUSINESS LOAN APPLICATION

Personal statement of assets and liabilities of – (names)

Liabilities			Assets	
	Monthly Payments	Balance O/S		Value
Mortgage debts -			Real estate -	
Term loans -			1.	
1.			2.	
2.			3.	
3.			4.	
Overdrafts -			5.	
1. Limits \$				
2. Limits \$				
Other loans /HP /lease -			Motor vehicles -	
1.			1.	
2.			2.	
3.			3.	
4.				
5.				
Credit cards -				
1. Limits \$			Cash	
2. Limits \$			Other	
3. Limits \$				
Other				
Totals				

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