



EQUIPMENT FINANCE APPLICATION

BORROWING ENTITY

Sole Trader Partnership Pty Ltd Trust

Borrower's Name in full				
	ABN		ACN	
Business Trading Address				Postcode
Postal Address	As above <input type="checkbox"/>			
Contact Person			Phone	
Email			Fax	
Briefly describe the business				
Type of Industry			Date commenced trading (under current ownership)	
			Years of management experience of director/key decision maker	
Total loan amount sought	\$	Loan Term (months)		Residual %
		Maximum monthly \$ payment amount requested		\$
Brief overview	describe the type of equipment and it's intended use for business			
What is the purpose of the loan ?	eg purchase new/used, balloon refinance, rollover to reduce payments, asset replacement, enable business expansion			
Work history; business/contractor/self employed ?	prior experience of key personnel if this entity trading <3 yrs ? For how long?, who are the clients?, area/locale of operations?, customer concentration >25%?			
Debtor terms	invoicing cycle, debtor terms, debtor finance if any			
Capital requirements	is working capital needed or cap ex anticipated ?			
Any issues to mitigate?	eg credit record , succession, key person insurance, ATO portal clear, non-performing debts			
Comments on previous account, payments history?				

REFERENCES

Accountant's business name		Phone	
Contact Person		Email	

Business banking with	Branch	Time with bank	Type(s) of account

Trade Referees	Monthly Spend/Payment	Contact Person	Phone

EQUIPMENT DETAILS

Complete this section only if dealer invoices are not supplied with application or if there are multiple items with different terms

	<input type="checkbox"/> New <input type="checkbox"/> Used <input type="checkbox"/> Refinance <input type="checkbox"/> Balloon rollover <input type="checkbox"/> Private		<input type="checkbox"/> New <input type="checkbox"/> Used <input type="checkbox"/> Refinance <input type="checkbox"/> Balloon rollover <input type="checkbox"/> Private		<input type="checkbox"/> New <input type="checkbox"/> Used <input type="checkbox"/> Refinance <input type="checkbox"/> Balloon rollover <input type="checkbox"/> Private	
Type of Equipment						
Year						
Make						
Model						
Colour and Body Type						
VIN / serial no.						
Engine no.						
Registration						
Odometer/Hours						
Cost (inc GST)	\$		\$		\$	
GST	\$		\$		\$	
Deposit:	\$		\$		\$	
Loan Amount	\$		\$		\$	
Loan Term (months)						
Residual %						
Supplier						
Contact person						
Phone						
If Refinancing:-						
<i>Lender</i>						
<i>Registered owner</i>						
<i>Payout amount</i>	\$		\$		\$	
<i>Payout expiry date</i>						

INDIVIDUAL'S DETAILS

	Individual 1			Individual 2		
	<input type="checkbox"/> Applicant <input type="checkbox"/> Guarantor <input type="checkbox"/> Director			<input type="checkbox"/> Applicant <input type="checkbox"/> Guarantor <input type="checkbox"/> Director		
Family name						
Given name(s)						
Date of Birth						
Drivers Licence No		State			State	
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> De facto			<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> De facto		
Number of Dependants		Age/s			Age/s	

Present home address						
	State		Postcode		State	Postcode
At this Address* since	Month		Year		Month	Year
Current Residential status:	<input type="checkbox"/> Home Owner <input type="checkbox"/> Renting \$ _____ p.w			<input type="checkbox"/> Home Owner <input type="checkbox"/> Renting \$ _____ p.w		
Rental agent/Location/Phone no	Agent details					
Mailing/Postal Address	As above <input type="checkbox"/>			As above <input type="checkbox"/>		
Phone numbers (please circle preferred)	Home		Work		Home	Work
	Mobile				Mobile	
Email address						

Occupation/Position						
Gross Income (\$ p.a.)	\$ _____			\$ _____		
Employer's Name	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Home Duties			<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Home Duties		
	<input type="checkbox"/> PAYG <input type="checkbox"/> Self Employed <input type="checkbox"/> Unemployed			<input type="checkbox"/> PAYG <input type="checkbox"/> Self Employed <input type="checkbox"/> Unemployed		
Employer's Trading Address						
Began* with this employer	Month		Year		Month	Year
Payroll contact name/ number						

*If you have been in your current home **for less than 2 years** please fill in Previous Address details

Previous home address						
	State		Postcode		State	Postcode
At prev Address from	Month		Year		Month	Year

*If you have been in your current job **for less than 2 years** please fill in Previous Employment Details

prev Occupation/Position						
prev Gross Income (\$ p.a.)	\$ _____			\$ _____		
prev Employer's Name						
prev Employer's Address						
Began with this employer	Month		Year		Month	Year
Payroll contact name/ number						

VEHICLE / EQUIPMENT LOANS SCHEDULE – ALL CURRENT & PROPOSED LOANS

<u>Financier</u>	<u>Goods / Security</u>	<u>Established</u>	<u>Expiry</u>	<u>Payment</u>	<u>Balloon</u>	<u>Owing</u>	<u>Estimated Value</u>	<u>Use: Personal (P) or Business (B)</u>
		/ 20	/ 20	\$	\$	\$	\$	
		/ 20	/ 20	\$	\$	\$	\$	
		/ 20	/ 20	\$	\$	\$	\$	
		/ 20	/ 20	\$	\$	\$	\$	

BUSINESS / TRUST LOANS SCHEDULE – ALL CURRENT & PROPOSED LOANS

<u>Financier</u>	<u>Security</u>	<u>Monthly Payment</u>	<u>Years / Months Remaining</u>	<u>Owing</u>	<u>Security Value</u>	<u>Borrower</u>
		\$		\$	\$	
		\$		\$	\$	
		\$		\$	\$	
		\$		\$	\$	
		\$		\$	\$	

BORROWER ENTITY A&L

Assets and Liabilities For:	insert Borrower name			
LIABILITIES <small>(what you owe)</small>	Monthly Payments	Balance / Limit	ASSETS <small>(what you own)</small>	Value

REAL PROPERTY

Mortgage With:	\$	\$	Address:	\$
Mortgage With:	\$	\$	Address:	\$

REAL PROPERTY

PLANT & VEHICLES

Loan With:	\$	\$	Asset Type:	Year:	\$
			Make:	Model:	
Loan With:	\$	\$	Asset Type:	Year:	\$
			Make:	Model:	
Loan With:	\$	\$	Asset Type:	Year:	\$
			Make:	Model:	

PLANT & VEHICLES

Business Term Loan With:	\$	\$	Business equipment :	\$
			Insured With:	
Bank Overdraft With:	\$	\$	Cash and Investments With :	\$
C/CARD <input type="checkbox"/> Visa <input type="checkbox"/> M/Card	\$	\$	Shares :	\$
Lender:				
C/CARD <input type="checkbox"/> Visa <input type="checkbox"/> M/Card	\$	\$	Other :	\$
Lender:				
Trade Creditors :	\$	\$	Loans out to :	\$
Other (specify):	\$	\$	Other (specify):	\$
Other (specify):	\$	\$	Other (specify):	\$
Total liabilities	\$	\$	Total assets	\$
			Surplus (Assets – Liabilities)	\$

MONTHLY LIVING FIXED EXPENSE: <small>(Groceries, Fuel, Electricity, etc)</small>	Monthly:	\$	Gross Sales	\$
DISCRETIONARY EXPENSES: <small>(Foxtel, Entertainment, Subscriptions etc)</small>	Monthly	\$	Net Income	\$
Childcare / School Fees	Monthly	\$	Addbacks: Depreciation / Interest	\$

GUARANTORS A&L

(complete one per 'family group')

Assets and Liabilities For:	insert Guarantor name(s)			
LIABILITIES <small>(what you owe)</small>	Monthly Payments	Balance / Limit	ASSETS <small>(what you own)</small>	Value
REAL PROPERTY		REAL PROPERTY		
Mortgage With:	\$	\$	Address:	\$
Mortgage With:	\$	\$	Address:	\$
Mortgage With:	\$	\$	Address:	\$
VEHICLES		VEHICLES		
Car Loan With:	\$	\$	Make:	Year: \$
Car Loan With:	\$	\$	Make:	Model: \$
Car Loan With:	\$	\$	Make:	Year: \$
Car Loan With:	\$	\$	Make:	Model: \$
C/CARD <input type="checkbox"/> Visa <input type="checkbox"/> M/Card	\$	\$	Personal effects / Furniture	\$
Lender:			Insured With:	
C/CARD <input type="checkbox"/> Visa <input type="checkbox"/> M/Card	\$	\$	Savings /Cash at Bank With :	\$
Lender:				
C/CARD <input type="checkbox"/> Visa <input type="checkbox"/> M/Card	\$	\$	Superannuation	\$
Lender:			Name of Fund:	
Other (specify):	\$	\$	Other (specify):	\$
Other (specify):	\$	\$	Other (specify):	\$
Total liabilities	\$	\$	Total assets	\$
			Surplus assets (Assets – Liabilities)	\$

I/We certify the above information is complete and correct and that the assets referred to are not subject to any encumbrances, trusts, or other interests except as disclosed and that there are no material omissions.

Applicant name _____

Director/Guarantor 1 Name _____ Director/Guarantor Name _____

Signature _____ Signature _____

Date _____ Date _____



NEW LENDING APPLICATION CHECKLIST

For us to process and submit your loan application, the following documentation is required and is to be submitted with the application form.

When ALL the required information is collated, email or post the supporting documents to our office:

apply@thealliancegroup.com.au

REPLY PAID 289, BULIMBA QLD 4171

Evidence of Income

– please supply as much as is available, if anything is unavailable just let us know

- Most recent year Tax Returns for all entities if Self-Employed / Business
- Most recent year Personal Returns with Notice of Assessment if Self Employed
- Year to Date

Refinance or Purchase:

▪ Please provide extract of all banking accounts (eg: Savings, Loan, Credit Card) held which can be copied and emailed or sent via:

<https://www.thealliancegroup.com.au/statements-3m>

If you're replacing /upgrading equipment, we need to verify the account conduct.

Please contact your lender directly to request a minimum of 6 months transactions history & a current payout letter.

Scan of Drivers Licence & Trust Deed for any borrower/guarantor (if applicable)

Privacy consent will be issued (via SMS & email) once the application is received – this needs to be signed before any application can be submitted

Requirements or Comments from Alliance:
