



AFM Mortgage & Finance Pty Ltd

The home loan, motor vehicle and equipment finance specialists

Business Finance Application

ABN 89 117 030 547* PO Box 14387 Melbourne VIC 8001* Tel 1300 887 588* Fax 1300 887 688 * Web www.autofleet.com.au

443 King Street
Melbourne VIC 3000

2/109 Fairford Road
Padstow NSW 2211

1/44-52 Townshad St
Phillip ACT 2606

3/285 Lord Street
East Perth WA 6004

29/194 Breakfast Creek Rd
Newstead QLD 4006



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Introduction

What we will need from you:

Finance Application Form including Details of Goods to be Financed

In most cases you have already found the item you wish to finance. If you are still looking or haven't made up your mind as yet, we can obtain you an Approval in Principle. This allows you the comfort of knowing that the funds are available when you go shopping and when signing an order or contract to purchase, you can still sign the order subject to finance to protect yourself. Once the financier is notified of the goods and supplier, they can do the final 'sign off' and we can then proceed to order the invoice and complete documentation.

Statement of Assets and Liabilities

The Statement of Position is required to be completed by each individual borrower, apart from spouse and de facto, who may complete one per couple. The financier requires Mortgage and Lease to provide this information as part of the finance submission.

Acknowledgement

Accountant Authority

Privacy Act

Under current Privacy Act laws, Mortgage and Lease cannot submit an Application for Finance without the client giving written permission via way of a signed Privacy Act Form. This permission allows the financial institution that will receive your application the ability to conduct credit checks, such as Credit Advantage and other finance company references.

Latest Financials

If you are self-employed or a company, you are required to submit you latest Tax Returns or trading figures. If you do not have them on hand, you can contact your accountant and have them either fax or email your financials to Mortgage and Lease or we can assist you by contacting your accountant on a direct basis and have them send the financials to us after you have completed the Mortgage and Lease Accountant's Authority form.

Personal Tax Returns, Letter From Employer Confirming Income & Last Group Certificate

If you are a PAYG client, we require details of your income. This can be done in several ways.

- A copy of your last Tax Return showing your taxable income.
- A copy of your last Group Certificate showing your income from your employer.
- A letter from your employer, stating your salary and other benefits such as a car allowance or the ability to salary sacrifice along with a payslip. The letter needs to be on company letterhead and include the name and contact number of the payroll officer or Director should the financier need to obtain verbal confirmation.

Current Rates Notice for Your Property(ies)

With recent changes to the Privacy Act, Financiers are unable to obtain property ownership records. If you are the owner of a property, can you please provide a copy of an up to date Council Rates notice or other proof of ownership.

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Applicant Details

Company name (full name of borrowing entity including trust and trading names if applicable)		
ABN	ACN	
Trading address		
Postal address		
Years established		
Primary contact		
Phone	Fax	Mobile
Email		
Nature of business		

Partners/Directors Details

1.	Full name	
	Date of birth	Drivers licence no.
	Residential address	
	Previous address if above is less than two years	
	Are you aware of any defaults or outstanding judgements against you? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If yes, please explain briefly	

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2.	Full name	
	Date of birth	Drivers licence no.
	Residential address	
	Previous address if above is less than two years	
	Are you aware of any defaults or outstanding judgements against you? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If yes, please explain briefly	
3.	Full name	
	Date of birth	Drivers licence no.
	Residential address	
	Previous address if above is less than two years	
	Are you aware of any defaults or outstanding judgements against you? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If yes, please explain briefly	
4.	Full name	
	Date of birth	Drivers licence no.
	Residential address	
	Previous address if above is less than two years	
	Are you aware of any defaults or outstanding judgements against you? <input type="checkbox"/> Yes <input type="checkbox"/> No	
	If yes, please explain briefly	
Further Partner/Director information attached to Application Form: <input type="checkbox"/> Yes <input type="checkbox"/> No		

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Accountant's Details

Business Name	
Contact	
Phone	Fax

Bank Details

Name		
Branch		
Business Banking Manager name (if applicable)		
Business Banking Manager phone (if applicable)		
Are you aware of any defaults or outstanding judgements against the business? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, please explain briefly:		

Finance History

1.	Bank/financier account no.
	Goods
	Status: <input type="checkbox"/> Current <input type="checkbox"/> Finalised
	Term Payment amount \$
2.	Bank/financier account no.
	Goods
	Status: <input type="checkbox"/> Current <input type="checkbox"/> Finalised
	Term Payment amount \$
3.	Bank/financier account no.
	Goods
	Status: <input type="checkbox"/> Current <input type="checkbox"/> Finalised
	Term Payment amount \$

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Trade References (if applicable)

1.	Company name	
	Contact	Contact phone
	Industry type	
2.	Company name	
	Contact	Contact phone
	Industry type	
3.	Company name	
	Contact	Contact phone
	Industry type	

Goods to be Financed

Type:	<input type="checkbox"/> Motor vehicle	<input type="checkbox"/> Equipment/plant	<input type="checkbox"/> Computer	<input type="checkbox"/> Other
Brief description (including make and model if applicable)				
<input type="checkbox"/> New	<input type="checkbox"/> Used	Year of manufacture		
Purchase price \$		Trade in \$		
Deposit \$		Amount to be financed \$		

Supplier Details

<input type="checkbox"/> Dealer (LMCT)	<input type="checkbox"/> Private sale
Name	
Address	
Contact person	
Phone	Fax

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Statement of Assets & Liabilities

★ Please Note ★

Each and every Partner/Director must complete a separate Statement of Assets and Liabilities (below) other than Spouse/De Factos who are Partners/Directors of the same business and may complete one Statement of Assets and Liabilities.

Assets	Balance
Cash in bank	\$
Property 1 (address:)	\$
Property 2 (address:)	\$
Property 3 (address:)	\$
Motor vehicle 1	\$
Motor vehicle 2	\$
Furniture & effects (insured value)	\$
Superannuation	\$
Shares	\$
Other (details:)	\$
Total assets	\$
Liabilities	Balance
Bank overdraft	\$
Mortgage 1 (lender: payments pm: \$)	\$
Mortgage 2 (lender: payments pm: \$)	\$
Mortgage 3 (lender: payments pm: \$)	\$
Credit card 1 (lender: limit: \$)	\$
Credit card 2 (lender: limit: \$)	\$
Other 1 (details:)	\$
Other 2 (details:)	\$
Total liabilities	\$
Total assets over liabilities	\$

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Accountant Authority

Should you wish us to gain information directly from your accountant, please complete this form. AFM Mortgage & Finance will fax it to your accountant on your behalf.

Business Name	
Contact	
Address	
Phone	Fax

I/we authorise the above accountant to provide the last two year's of the following to AFM Mortgage & Finance:

Balance Sheets

Tax Returns

Financial Statements

I/we understand the above information may be given orally or in such form as is required.

Print name _____

Print name _____

Sign _____

Sign _____

Date _____

Date _____

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Business Finance – Privacy Act

In compliance with the Commonwealth Privacy Act, applicant parties to a finance application who are natural persons should complete and give this authorisation to the Introducer/Broker named below.

Name of Introducer:	AFM Mortgage & Finance Pty Ltd
ACN:	117 030 547
Name(s) of Applicant(s):	
Amount of Application:	
Purpose:	

1. Acknowledgement of Disclosure of Credit Information to a Credit Reporting Agency

I/we acknowledge that Section 18E(8)(c) of the Privacy Act allows credit provider(s) which the above named Introducer may approach in arranging my/our finance (hereinafter the Approached Credit Provider), to give a credit reporting agency certain personal information about my/our application for finance.

The information which may be given to an agency is covered by Section 18E(1) of the Act and includes:

- Such permitted particulars which allows identification;
- The fact finance has been applied for and the amount;
- The fact that the above-named Credit Provider is a current Credit Provider;
- Payments which become overdue more than 60 days, and for which collection action has commenced;
- Advise that payments are no longer overdue;
- Cheques drawn which have been dishonoured more than once;
- In specified circumstances, that in the opinion of the above-named Credit Provider a serious credit infringement has been committed;
- That finance provided by the above-named Credit Provider has been paid or otherwise discharged.

By virtue of this declaration, I/we understand that the above-named Introducer has informed me/us of the disclosure policy to a credit reporting agency of information about me/us by Approached Credit Providers and so authorise such disclosures.

2. Agreement/Authority by Applicant for Credit Provider to Perform Certain Permitted Actions Concerning a Finance Application or Transaction

I/we agree that, if it is considered relevant in assessing my/our application for personal credit, the Approached Credit Provider may obtain a report about my/our commercial activities or commercial credit worthiness from a business, which provides information about the commercial credit worthiness of persons [Section 18L(4)].

I/we agree that, if it is considered relevant in assessing my/our application for commercial credit, the Approached Credit Provider may obtain from a credit-reporting agency a credit report containing personal credit information about me/us [Section 18K(1)(b)].

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Privacy Act (continued)

I/we agree that the Approached Credit Provider may give to and seek from any credit providers named in the accompanying finance application and any credit providers that may be named in a personal or commercial credit report issued by a credit reporting agency or a commercial credit reporting agency respectively, information about my/our personal or commercial credit arrangements. I/we understand that this information can include any information about my/our credit worthiness, credit standing, credit history or credit capacity that credit providers are allowed to give or receive from each other under the Privacy Act [Section 18N(1)(b)].

3. Authorisation to Act on Behalf of Individuals

For the purposes of arranging finance which is the subject of my/our application, the details of which appear above, I/we authorise the above-named Introducer to obtain a report about my/our consumer or commercial credit worthiness from a credit reporting agency or a commercial credit reporting business [Section 18H(3)] or from a credit provider named in this application or referred to in such reports [Section 18N(1)(ga)].

I/we also authorise the above-named Introducer to pass on the above-obtained reports to such credit providers as are appropriate, for their consideration of the application for finance. I/we also authorise the above-named Introducer to give to and receive from such parties as are necessary to the arranging of the finance, such personal information about me/us which is necessary to such arrangement or subsequent management.

Print name	_____	Print name	_____
Sign	_____	Sign	_____
Date	_____	Date	_____

4. Guarantor Parties Agreement

I/we agree that the Approached Credit Provider may seek a credit report concerning me/us from a credit-reporting agency to assess whether to accept me/us as a guarantor of the finance commitments for the above-named Applicant Parties [Section 18K(1) (c)] and in so doing, I/we acknowledge that such Credit Provider may give personal information about me/us as per paragraph 1 of this Authority.

Print name	_____	Print name	_____
Sign	_____	Sign	_____
Date	_____	Date	_____

This authorisation remains in force until the finance transaction is arranged, whereupon it will be replaced by an Authorisation/Agreement in favour of the Approached Credit Provider that provides the finance covered by the Finance Application.

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