

**Enquiry Form**
**FAX TO: 1300 886 179**
**Office Use Only**

Appointment Details	Date	Time
Lending Consultant		

**Company / Trust - Borrowers Only**
**Business Details**

Company / Business Name			Date Incorporated / Registered	
A.C.N. (if applicable)				
A.B.N.		Date Registered		
Registered Business Address				
Brief Description of Main Business				
Main Income Source (pls. circle)	Trading	Investment		
2010 Net Taxable Profit (estimated year to date)	\$		YTD Month	
2009 Net Taxable Profit	\$			
2008 Net Taxable Profit	\$			

**Director 1 (or guarantor if applicable)**

Full Name					
Address					
Tel	Fax			Mobile	
Residential Status (pls. circle)	Owner	Mortgaged	Renting		

**Director 2 (or guarantor if applicable)**

Full Name					
Address					
Tel	Fax			Mobile	
Residential Status (pls. circle)	Owner	Mortgaged	Renting		
<b>FINANCE TYPE</b>	Property Investment	Property Development	Owner Occupied		

**LOAN DETAILS**

<b><u>Loan Purpose</u></b>	Purchase	Refinance	Refinance / Cash Out	Investment	Owner Occupied	
Loan Amount	\$					
Interest Type	Variable	Fixed	Capitalised	Prepaid		
Annual Rental Income						
Transaction History - Has this been sent to other lenders or brokers	Yes	No				
	Details:					
Comments						

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### Lender Preferences

Preferred Lenders (if any)

Non - Preferred Lenders (if any)

### **Security Offered (1)**

Security Address

Security Type (pls. circle)

Residential

Commercial

Other

If Commercial (pls. circle)

Retail

Office

Industrial

Other

Security Use (pls. circle)

Owner Occupied

Investment

Income Details (investment only) (pls. specify & circle)

\$

per annum

per month

per fortnight

per week

Income Type (investment only) (pls. circle)

Gross

Net

Security Status (pls. circle)

Under Contract

Owned

Mortgaged

If Under Contract

Finance Expiry Date

Settlement Date

If Mortgaged, Existing Lender Details

Lender Name

Product Type

Rate

Contact for Valuer Access

Name

Phone Number

Registered Owner(s) to / which Appear on Title

Title Particulars (if known)

Volume

Folio

or

Lot

DP

Tenure (type of title)

Torrens

Strata

Community

Leasehold

Other

If Other Tenure, pls. specify

Most Recent Council Valuation (if known)

\$

### **Accountant Details**

Name

Address

Contact Person

Name

Phone Number

### **Director 1 (or guarantor if applicable)**

Description (i.e. Address, Make & Model)	Assets		Liabilities			
	Value (\$)	Gross Mthly Income (if any)	Loan Type (i.e. Mortgage, LOC, Personal Loan, Credit Card, etc.)	Lender	Value	Outstanding (\$) (for LOC or Credit Cards include limit)
<b>Total Assets</b>		\$	<b>Total Liabilities</b>			\$

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**Director 2 (or guarantor if applicable)**

Description (i.e. Address, Make & Model)	Assets		Liabilities			
	Value (\$)	Gross Mthly Income (if any)	Loan Type (i.e. Mortgage, LOC, Personal Loan, Credit Card, etc.)	Lender	Value	Outstanding (\$) (for LOC or Credit Cards include limit)
<b>Total Assets</b>		\$	<b>Total Liabilities</b>			\$

**ALLIED CAPITAL PTY LTD ABN: 21 113 619 364  
Consent to Disclose Personal Information to ALLIED CAPITAL**

ALLIED CAPITAL PTY LTD (Allied Capital) ABN: 21 113 619 364 and its Appointed Agent, are required to collect, use and disclose your personal information to provide the products and services requested by you or on your behalf. Appointed Agent means the Appointed Agent specified below and includes successors, assigns and transferees.

**PURPOSE FOR COLLECTING PERSONAL INFORMATION**

You agree that Allied Capital and its Appointed Agent may collect, use and disclose your personal information for the following purposes:

1. Processing and tracking your requested services and products;
2. Processing commission payments to Allied Capital and its Appointed Agent;
3. Marketing and sales promotion so as to inform you of any similar or new products and services which may be of benefit to you in the future;
4. Administrative operations including statistical reports, accounting, record keeping, development and testing of systems and the training of staff and appointed agents;
5. Complying with legislative and regulatory requirements; and
6. Developing, establishing and administering alliances and other arrangements with other organisations relating to the promotion, administration and use of our respective products and services.

**DISCLOSURE OF PERSONAL INFORMATION**

You agree and consent that Allied Capital and its Appointed Agent may disclose your personal information to each other. You also agree and consent that Allied Capital and its Appointed Agent may disclose your personal information to the following types of organisations for the purposes outlined above:

1. Banks, non-banks and other financial institutions;
2. Allied Capital's related corporations;
3. Organisations with whom Allied Capital have alliances and arrangements and any agents used by Allied Capital and its business partners in administering such an alliance or arrangement; and
4. Any person(s) or contractor(s) engaged by Allied Capital.

**ACCESS TO YOUR PERSONAL INFORMATION**

All your personal information held by Allied Capital will be used and disclosed in accordance with the Allied Capital Privacy Policy. Subject to the provisions of the Privacy Act 1988 (Cth), you can arrange access to your personal information held by Allied Capital and its Appointed Agent by calling the Allied Capital Head Office on 1300 662 524. If you do not provide Allied Capital and its Appointed Agent with the requested personal information, Allied Capital will not be able to supply you with the products and services requested by you or on your behalf. You have the right at any time to request Allied Capital and its Appointed Agent not to telephone you or provide you with any further

information about products and services and not to disclose your information to any other organisations (including related corporations) for that purpose. You may do this by calling your Allied Capital office on 1300 662 524. Commission Disclosure Acknowledgement I/we refer to my/our Application to the Lender and acknowledge that I/we have been made aware that if the Lender approves the Application and I/we proceed to accept the Lender's subsequent offer of a loan or overdraft facility, the Lender will pay Allied Capital a fee for an amount agreed between the Lender and Allied Capital for the Appointed Agent's work in the preparation and administration of the Application. I/we also acknowledge that Allied Capital has the right to pay a fee to the Appointed Agent and Allied Capital and the Appointed Agent may pay a fee to any referring party for any assistance with completing this finance application and also for introducing you to Allied Capital and / or the Appointed Agent. Finance Broking Contract Acknowledgement

**NSW residents only**

I/we refer to my/our Application to the Lender and acknowledge I/we have been made aware that in certain circumstances the Finance Broker is required to enter a Finance Broking Contract with the borrower prior to undertaking work on an application. The broker has explained that I/we may make an application to the Consumer Trade & Tenancy Tribunal no later than 3 years after an alleged non compliance, unjust conduct or charging excessive commission and that they must keep full particulars of the transaction for 7 years.

**APPLICANT/S ACKNOWLEDGEMENT**

I/we acknowledge that I/we have read the above and agree that my/our personal information may be passed to Allied Capital to be used as stated above. I/we also consent to Allied Capital paying a fee to the Appointed Agent for this transaction. I/we understand that if I/we do not sign this consent and acknowledgement form, the Appointed Agent will not be able to complete my/our services and products requested, and all my/our personal information will be discarded in a safe and secure manner.

<b>Full Name of Applicant 1</b>			<b>Signature of Applicant</b>		<b>Date</b>
<b>Full Name of Applicant 2</b>			<b>Signature of Applicant</b>		<b>Date</b>