

Loan Application



This form may be lodged with Uniting Financial Services or posted to:

Uniting Financial Services
PO Box A2178
Sydney South NSW 1235



Helpful hints for completing this application

Please ensure the following information is attached to this loan application.

- Last three (3) years of audited financial statements or UR2.
- Copy of the "Contract of Sale" for the property being purchased. If the loan is for a purpose other than the purchase of property, then provide copies of relevant quotes or invoices.
- Last three (3) months statements for accounts held with other financial institutions.
- Mission or business plan (not required for loans under \$50,000).
- Copies of leases (if applicable).
- Documentary evidence of gifts/grants outlining terms and conditions.



Need help or have a question?

Call us on **1300 133 673**

Visit us at unitingfinancial.com.au

Email us at contactus@unitingfinancial.com.au

Please use **BLOCK LETTERS** in **BLACK OR BLUE PEN ONLY** and tick required choices

STEP 1 – YOUR ORGANISATION'S DETAILS

Uniting Church organisation name

Presbytery or Board name that your organisation reports to

ACN/ABN

Address

Suburb

State

Postcode

Postal address (if different from above)

Suburb

State

Postcode

Website

Main business activity

Other business activities

STEP 1 **STEP 2** **STEP 3** **STEP 4** **STEP 5** **STEP 6** **STEP 7** **STEP 8** **STEP 9**

STEP 2 – ORGANISATION CONTACT PERSON DETAILS

1. Title Full name

Position (e.g. Treasurer etc.)

Business telephone Other/home telephone Mobile

Fax Email

2. Title Full name

Position (e.g. Treasurer etc.)

Business telephone Other/home telephone Mobile

Fax Email

STEP 3 – NOMINATION FOR NOTICES



If you do not wish to receive statements and notifications to the postal address noted above, you can nominate an alternative signatory to receive them. All correspondence will be posted to the address held on file for the nominated signatory.

Details of person to receive statements and notices on this loan

Postal address

Suburb

State

Postcode

STEP 4 – DETAILS OF LOAN

Loan purpose (Attach Mission/Business Plan if amount sought is in excess of \$50,000)

Amount of loan

Term required (years)

Home Loan Options

- Interest Only (Maximum 5 years) Principle & Interest
- Fixed Rate (Rate available on application) 1YR 2YRS 3YRS 4YRS 5YRS
- Variable Split

STEP 5 – SELF HELP LOAN



Complete only if applying for a Self Help Loan

Total Self Help Investments held in Self Help Scheme

 .

Scheme No.

Scheme Organiser details

Title

Full name

Address

Suburb

State

Postcode

Daytime telephone

Email

STEP 6 – FUNDING TABLE

Funds required

| | | |
|----------------------------------|----|---|
| Contract price/ Refinance amount | \$ | . |
| Stamp Duty on property transfer | \$ | . |
| Other establishment costs | \$ | . |
| Debt consolidation | \$ | . |
| Other (specify) | \$ | . |
| Other (specify) | \$ | . |
| Total funds required (A) | \$ | . |

Contribution

| | | |
|----------------------------------|----|---|
| Deposit paid | \$ | . |
| Funds held | \$ | . |
| Gifts/Grants etc. | \$ | . |
| Other (specify) | \$ | . |
| Other (specify) | \$ | . |
| Other (specify) | \$ | . |
| Total funds available (B) | \$ | . |

Total loan sought = (funds available less funds required) (B – A)

 .

STEP 7 – STATEMENT OF POSITION: ASSETS

List all investments and accounts held with any financial institution, including Uniting Financial Services

| Financial institution | Investment/Account number | Type (Cheque, Fixed Term, etc.) | Current balance/value |
|-----------------------|---------------------------|---------------------------------|-----------------------|
| | | | \$. |
| | | | \$. |
| | | | \$. |
| | | | \$. |

List details of all shares and/or managed funds held

| ASX Code or Fund Name | Number of shares or units held | Current balance/value |
|-----------------------|--------------------------------|-----------------------|
| | | \$. |
| | | \$. |
| | | \$. |
| | | \$. |

List details of any current bequests made to your organisation

| Source | Terms of the bequest (e.g. interest only can be used) | Value/insured value |
|--------|---|---------------------|
| | | \$. |
| | | \$. |
| | | \$. |
| | | \$. |

TOTAL ASSETS – if insufficient room for details please provide an attachment

| |
|------|
| \$. |
|------|

STEP 7 CONTINUED – STATEMENT OF POSITION: LIABILITIES

List all financial liabilities held including with Uniting Financial Services (ie. all loans including Schofield/Woolnough loans, leases and overdrafts, etc. that are required to be repaid).

| Financial provider | Type (e.g. Interest Only Loan, Term Loan, Overdraft etc.) | Interest rate | Repayment amount and Frequency (e.g. \$500/mth) | Remaining term | Current balance/value |
|--------------------|---|---------------|---|----------------|-----------------------|
| | | | | | \$. |
| | | | | | \$. |
| | | | | | \$. |
| | | | | | \$. |

List details of all credit or store cards held including those issued by Uniting Financial Services

| Issuer | Card limit | Interest rate | Monthly repayments | Current balance/value |
|--------|------------|---------------|--------------------|-----------------------|
| | \$ | | \$ | \$. |
| | \$ | | \$ | \$. |
| | \$ | | \$ | \$. |
| | \$ | | \$ | \$. |

List all grants and/or gifts and whether they are required to be repaid in part or full

| Source of Grant/Gift (e.g. Presbytery, SMRF etc.) | Terms and conditions of the gift or grant | Amount to be repaid | Total gift |
|---|---|---------------------|------------|
| | | \$. | \$. |
| | | \$. | \$. |
| | | \$. | \$. |
| | | \$. | \$. |
| | | \$. | \$. |
| | | \$. | \$. |

TOTAL LIABILITIES – if insufficient room for details please provide an attachment

\$.

Monthly income

| Sources | \$ Amount |
|--------------|-----------|
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| TOTAL | \$. |

Monthly expenditure

| Details | \$ Amount |
|--------------|-----------|
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| | \$. |
| TOTAL | \$. |

STEP 8 – LOAN SECURITY



List all properties that your organisation has stewardship over.

1. Address of property 1

Suburb

State

Postcode

Market value

Property type:

Church

Manse

Hall

Other

2. Address of property 2

Suburb

State

Postcode

Market value

Property type:

Church

Manse

Hall

Other

3. Address of property 3

Suburb

State

Postcode

Market value

Property type:

Church

Manse

Hall

Other

4. Address of property 4

Suburb

State

Postcode

Market value

Property type:

Church

Manse

Hall

Other

5. Address of property 5

Suburb

State

Postcode

Market value

Property type:

Church

Manse

Hall

Other

Please photocopy this page if you have more properties to list.

STEP 9 – AUTHORISATION

I/We declare that all information provided in this application is true and correct. We are authorised to apply for this loan on behalf of the organisation in accordance with a resolution passed at a legally constituted meeting of its Church Council Committee members.



I/We undertake to provide Uniting Financial Services with such additional information or documentation as Uniting Financial Services may request at any future time to ensure compliance with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.

PRIVACY

We consent to the collection, use and disclosure of our personal information as detailed in the *Financial Services Guide*, *Product Disclosure Statement* and the *Product Information Brochure*.

COLLECTION, USE AND DISCLOSURE OF PERSONAL INFORMATION

Information is collected from you to administer and manage your investments and if some or all the information is not collected then it may not be possible to administer your investment. We may use your personal information to provide you with information and marketing material about other products and services provided by Uniting Financial Services. We do not provide your information to any other organisation without your consent, other than those organisations that provide administrative or other services as part of the operation of our business. You can view and obtain our *Privacy Policy* from our website unitingfinancial.com.au

| | | | |
|--|--|--|--|
|  | Church Council Office Bearer <input type="text"/> |  | Church Council Office Bearer <input type="text"/> |
| | Print full name <input type="text"/> | | Print full name <input type="text"/> |
| | Date <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | | Date <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |



APPLICATION CHECKLIST

- Have you signed this application?
- Have all new signatories completed an *Identification and Verification Reference* form where required and provided I.D.?
- Have you attached your supporting documents, as listed on the first page?
- Please ensure all steps are completed where required?

Financial services are provided by The Uniting Church (NSW) Trust Association Limited ACN 000 022 480, ABN 89 725 654 978, AFSL 292186 and by The Uniting Church in Australia Property Trust (NSW) ABN 77 005 284 605 pursuant to a s.911A Corporations Act 2001 (Cth.) authorisation and APRA Banking Exemption No. 4 of 2014 ("Uniting Financial Services"), for The Uniting Church in Australia, Synod of NSW and the ACT pursuant to ASIC Regulatory Guide 87 exemptions. Uniting Financial Services® is a registered trademark of The Uniting Church (NSW) Trust Association Limited and is used with permission by The Uniting Church in Australia Property Trust (NSW). Neither The Uniting Church in Australia, Synod of NSW and the ACT, The Uniting Church in Australia Property Trust (NSW) nor Uniting Financial Services is prudentially supervised by APRA. An investment with or contributions will not benefit from the depositor protection provisions of the Banking Act 1959. All financial services and products are designed for investors who wish to promote religious and charitable purposes and for whom profit considerations are not of primary importance in their decision to invest.

STEP 1  STEP 2  STEP 3  STEP 4  STEP 5  STEP 6  STEP 7  STEP 8  **STEP 9**

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