



Loan Scenario Summary (to be typed)
 Please email to angie@combrokers.com.au (with an A&L)

Date:

Broker Name:	Mobile:
Email:	
Borrower 1:	Borrower 2:
Borrower Address:	

Borrower: Individual Company Trust Self Managed Super Fund

Please attach an A&L for each borrower/guarantor

<input type="checkbox"/> Self Employed	<input type="checkbox"/> PAYG
Industry:	Employer:
Yrs in industry:	Address:
Yrs in current business:	Yrs with current employer:
ABN:	Occupation:
GST registered? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Loan Type: Commercial Residential Development
 Equipment Finance Construction Other:

NB: Lo Doc commercial CONSTRUCTION loans only exist via private finance options (approximately costs 4% of loan amount, including mandate fee)

Purpose	\$			
Purchase	\$	Owner Occupied	<input type="checkbox"/>	
Refinance	\$			
Other	\$	Investment	<input type="checkbox"/>	
	\$			
Loan Required	\$	Rental Income	\$	per week
Security:				
Residential	<input type="checkbox"/> 1 st <input type="checkbox"/> 2 nd	Post Code	Value \$	Over 2 ha? <input type="checkbox"/> Yes <input type="checkbox"/> No
Commercial	<input type="checkbox"/> 1 st <input type="checkbox"/> 2 nd	Post Code	Value \$	Over 2 ha? <input type="checkbox"/> Yes <input type="checkbox"/> No



Loan Scenario Summary

Income / Full Doc: *(please attached most recent 2 years financials and tax returns for all entities)*

Has income changed recently? Yes No

If yes, please comment:

Income / Lo Doc:

Income Declared \$ _____ 12 months BAS available? Yes No

3 months trading account statements available? Yes No

Account Conduct & CRAA Issues

Are ALL loans/facilities in order? Yes No

If no, please comment:

Have there been any arrears in the past 6 months? Yes No

If yes, please comment:

Are there any known defaults or judgements? Yes No

If yes, please comment:

Has this application been/being submitted elsewhere? Yes No

Lender Name:

Why not proceeding?

Broker Signature: _____

PRIOR TO SUBMITTING, HAVE YOU:

Completed Scenario Form Completed Comments Page

Provided 2 years company financials & tax returns (if applicable)

Provided 2 years tax returns for individuals/ company directors (if applic)

Completed A&L

SCENARIO WILL NOT BE ASSESSED UNTIL ALL REQUIRED INFORMATION HAS BEEN RECEIVED



Customer Statement of Position

Statement of Position of : _____ **as at** / /

LIABILITIES	AMOUNT	ASSETS	AMOUNT
Bank Overdraft – Limit \$		Cash On hand	
Trade Creditors		Term Deposits	
Wages/Salaries owing to employees		Bank Account Balance/s	
Rates		Shares	
Taxes		Trade Debtors	
		Work in Progress	
Mortgagee/s		Deposit/s paid	
Lender:		Property (include addresses)	
Repay \$ per month		Owner Occupied	
Lender:			
Repay \$ per month			
Lender:		Investment Property/Other	
Repay \$ per month			
Lender:			
Repay \$ per month			
		Plant & Machinery	
Credit Cards (lender, limit)			
1. Limit \$		Life policies/ Super	
2. Limit \$			
3. Limit \$		Motor Vehicles (make, model, year)	
4. Limit \$			
Hire Purchase/ Personal Loans			
Lender:			
Repay \$ per month		Home Contents	
Lender:			
Repay \$ per month		Other Assets	
Lender:			
Repay \$ per month			
Other Liabilities/ Secured Debts			
Lender:			
Repay \$ per month			

I/We hereby certify and confirm that all of the above assets are held in my/our own right and do not form a part of any Trust/Trustee arrangement

Customer Signature X	Customer Signature X
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Comments

Provide any relevant comments to support your application