



SYDNEY OFFICE  
 LEVEL 12, 37 YORK STREET  
 SYDNEY NSW 2000.  
 TELEPHONE: (02) 8251-3222  
 FACSIMILE: (02) 9290-2128  
 FINANCE DIVISION

Loan Number:

## Payment Authorisation For Finance Application

Customers Name/s:

Contact Numbers:

Brokers/ Agent Name and Company

Broker / Agent Numbers:

Contact Numbers:

Payment of Loan Application Fee:       \$300.00      

Paid by:

Cheque       Cash       Credit Card

Card Number:

Name on Credit Card:

Expiry Date:

Signature:




Master Card     Visa Card     Bankcard

**If paying by cash or cheque please deposit to the following account:**    Credit Asset Management Ltd

**Bank:** National Australia Bank    **BSB:** 082057    **ACC:** 542 711 819    ( Please fax back with deposit receipt )



## Finance Application ( For Vehicle & Equipment )

### COMPANY SECTION

Name: \_\_\_\_\_

ABN: \_\_\_\_\_

Trust: \_\_\_\_\_

Trading As: \_\_\_\_\_

Address: \_\_\_\_\_ State : \_\_\_\_\_ P/Code : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Type of Operation: \_\_\_\_\_ Ph No : \_\_\_\_\_ Fax No : \_\_\_\_\_

### PRIVATE SECTION

Trading Name ( if applicable ) : \_\_\_\_\_

**Surname :** \_\_\_\_\_ Given : \_\_\_\_\_ Married : \_\_\_\_\_ Lic No : \_\_\_\_\_ DOB : \_\_\_\_\_

Address : \_\_\_\_\_ State : \_\_\_\_\_ P/Code : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Residential Status (e.g. Renting, Boarding, Owner Occupied) \_\_\_\_\_ Rental Expense \_\_\_\_\_

Landlord's name & contact details (if applicable): \_\_\_\_\_

Prev Add : \_\_\_\_\_ State : \_\_\_\_\_ P/Code : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Phone No : Private : \_\_\_\_\_ Bus : \_\_\_\_\_ Fax : \_\_\_\_\_ Mobile : \_\_\_\_\_

Employer : \_\_\_\_\_ Position : \_\_\_\_\_

Phone : \_\_\_\_\_ Contact: \_\_\_\_\_ Current Salary : \$ \_\_\_\_\_ No Yrs : \_\_\_\_\_

Prev Employ \_\_\_\_\_ Position : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Post Add: (if applicable) \_\_\_\_\_

**Surname2 :** \_\_\_\_\_ Given : \_\_\_\_\_ Married : \_\_\_\_\_ Lic No : \_\_\_\_\_ DOB : \_\_\_\_\_

Address : \_\_\_\_\_ State : \_\_\_\_\_ P/Code : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Residential Status (e.g. Renting, Boarding, Owner Occupied) \_\_\_\_\_ Rental Expense \_\_\_\_\_

Landlord's name & contact details (if applicable): \_\_\_\_\_

Prev Add : \_\_\_\_\_ State : \_\_\_\_\_ P/Code : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Phone No : Private : \_\_\_\_\_ Bus : \_\_\_\_\_ Fax : \_\_\_\_\_ Mobile : \_\_\_\_\_

Employer : \_\_\_\_\_ Position : \_\_\_\_\_

Phone : \_\_\_\_\_ Contact: \_\_\_\_\_ Current Salary : \$ \_\_\_\_\_ No Yrs : \_\_\_\_\_

Prev Employ \_\_\_\_\_ Position : \_\_\_\_\_ No Yrs : \_\_\_\_\_

Post Add: (if applicable) \_\_\_\_\_

### REFERENCE

Name	Company	Position	Address	Contact No.
1				
2				
3				



**FINANCIAL SECTION (Company & Self-Employed Only)**

Accountant :	Contact :	Phone :
Superannuation Agent :	Contact :	Phone :
Insurance Broker :	Contact :	Phone :
Bank : Company	Branch :	
: Private	Branch :	
: A/C No's		

**GOODS (Vehicle / Equipment)**

Supplier (Car Dealer) :	Contact Name:
Address :	Contact No :
Description (Year, Make, Model, Purchase Price)	

<b>OFFICE USE ONLY</b>		Cash Price	
Rate	Residual/Balloon% (Inc GST)	GST	
		Cash Deposit	
		Trade In	
Term In Mths	Repayment:	Brokerage	
Trade Description		Total to be Financed	
		Trade In Value	
Financed Through	Equity Used For	Less Pay-Out	
		Equity	

**General Comments:**

**Sydney Head Office:** Level 12, 37 York Street, Sydney NSW, 2000  
**Melbourne Office:** Level 4, 37-41 Prospect Street, Box Hill VIC, 3000  
**Brisbane Office:** Suite 107, 250 McCullough Street, Sunnybank QLD,4109

Tel: (02) 8251 3222 Fax: (02) 9290 2128  
 Tel: (03) 8635 1333 Fax: (03) 8635 1355  
 Tel: (07) 3323 8000 Fax: (07) 3219 5711



## STATEMENT OF FINANCIAL POSITION

Client Name :

ASSETS	VALUE	LIABILITIES	OWING
Bank Account 1		Loans	
Bank Account 2		Other	
Bank Account 3		Personal Loans	
Shares		Credit cards      Limit :	
Property		Limit :	
Household contents		Bank      Pmt	
Equipment		Mortgage 1	
Vehicles		Mortgage 2	
Other		Mortgage 3	
<b>TOTAL ASSETS</b>		<b>TOTAL LIABILITIES</b>	

INCOME	VALUE	EXPENSES	VALUE
Gross Salary / Wages      - self		Income tax                      - self	
Gross Salary / Wages      - spouse		Income tax                      - spouse	
Rental income                      - self		Mortgage repayments	
Rental income                      - spouse		Loan repayments	
Other income                      - self		Other payments                      - self	
Other income                      - spouse		Other payments                      - spouse	
		Rent	
<b>TOTAL INCOME</b>		<b>TOTAL EXPENSES</b>	

Comments:

<b>Signature(1)</b>	<b>Date</b>	<b>Signature(2)</b>	<b>Date</b>
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### PRIVACY ACT 1988 CONSENT

I/We acknowledge that I/we have made an application for credit from Strategic Alliance Mortgages (SAM). SAM may use the personal information I/we provide for the purpose of assessment for credit approval by SAM or any lenders or insurers listed on the attached schedule subject to the provisions of the Privacy Act, I/we may have access to personal information collected and held by SAM, and the Lenders and Insurers noted in the Schedule. I/We may contact these companies for access to my/our personal information held (if any) by contacting the Privacy Officer at the address or in the manner disclosed in the Schedule.

#### Authority to exchange information with other credit providers

In accordance with Section 18N(1)(b) of the Privacy Act, I/we authorise SAM to give and obtain from credit providers named in this credit application, and credit providers that may be named in a credit report issued by a credit reporting agency, information about my/our credit arrangements. I/We understand 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 1988.

Where SAM applies this information in connection with:

- ◆ Any finance sought by me/us from the Lender (whether sought by I/we alone or with others); or
- ◆ Any collateral and/or guarantee given or to be given by me/us (whether alone or with others) to secure the repayment of any finance provided or to be provided by the Lender;
- ◆ The Insurer will be collecting personal information about me/us.
- ◆ The Lender and Insurer will be collecting any such personal information about me/us for the purposes of:
- ◆ Assessing the risk of providing lenders insurance to the Lender in respect of finance sought by me/us from the Lender;
- ◆ Assessing the risk of me/us defaulting on your obligations to the Lender in respect of which the Insurer may provide (or has provided) lenders insurance;
- ◆ Assessing the risk of me/us being unable to meet a liability that might arise under a guarantee entered into, or proposed to be entered into, in respect of collateral finance given (or to be given) by the Lender to another person;
- ◆ The subsequent administration or variation of any lenders insurance cover provided;
- ◆ Risk assessment and management involving securitisation, credit scoring, portfolio analysis, reporting and fraud prevention and claim recovery; and
- ◆ Complying with legislative and regulatory requirements.

Without the provision of my/our personal information to the Lender and Insurer, the Insurer may be unable to process or accept the Lender's application for lenders insurance and the Lender may be unable to provide the collateral finance requested.

By signing the acknowledgment below, I/we agree and consent to SAM the Lender and Insurer using and disclosing the personal information it collects about me/us for the purposes set out above (subject to any restrictions imposed on the Lender and Insurer by Privacy Act 1988):

SAM, the Lender and Insurer will usually or may disclose personal information of the kind it collects about me/us to:

- ◆ Its related companies;
- ◆ Reinsurers;
- ◆ Credit reporting agencies;
- ◆ Its service providers;
- ◆ Its agents, contractors, and external advisers;
- ◆ My/our referees, including my/our employer;
- ◆ My/our legal and financial advisers;
- ◆ Government and other regulatory bodies;
- ◆ Ratings agencies;
- ◆ Payment system operators; and
- ◆ Other financial institutions, securitisers and credit providers.
- ◆ By signing the acknowledgment below, I/we agree and consent (subject to the restrictions imposed on the Insurer by the Privacy Act) to any such disclosures of your collected personal information by the Lender and Insurer, regardless of when or how the information was collected, even though some of the organisations may be overseas.
- ◆ If and to the extent that the Lender and Insurer does so in a manner and for purposes that conform with the Privacy Act, by signing the acknowledgment below, I/we agree and consent to:
- ◆ The Lender and Insurer obtaining information about my/our commercial activities and commercial credit worthiness from a business which provides information about the commercial credit worthiness of persons, and to the Insurer using that information in assessing the application of the Lender for lenders insurance;
- ◆ To the Lender and Insurer giving to and receiving from any credit providers named in the application for finance, and any credit providers named in a credit report issued by a credit reporting agency, information about my/our credit worthiness, provided that the information is given or received for the purpose of assessing the Lender's application for lenders insurance; and
- ◆ To the Lender and Insurer obtaining a commercial and/or consumer credit report containing personal information about me/us from a credit reporting agency and to the Insurer using that report or any information derived from the report in assessing the Lender's application for lenders insurance in respect of either consumer credit or commercial credit provided by the Lender, and for any other purposes permitted under the Privacy Act.

#### SIGNATURE OF APPLICANT / GUARANTOR

I/we declare that I am/we are over the age of 18 and the information contained in this application are true and correct in every particular and it is upon this basis that I/we make this application for credit. I/we also confirm our agreement to the matters set out above:

SIGNATURE(1) \_\_\_\_\_ PRINT NAME \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE(2) \_\_\_\_\_ PRINT NAME \_\_\_\_\_ DATE \_\_\_\_\_

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## **Car Loan/ Equipment Loan Application Basic Document Checklist**

- Fully completed SAM Leasing application form & Privacy Act
- Copy of borrower's driver licence
- Copy of Passport or citizenship certificate
- Income Proof:
  - ❖ Employment letter plus 2 recent payslips for PAYG applicant
  - ❖ Last 2 years individual tax returns for Self Employ applicant
  - ❖ Last 2 years company tax returns & Last 2 year's company director's individual tax returns for company applicant
  - ❖ Confirmation of rental income for investment property
- Banking statement (at least last month, prefer last 3-6 months)
- Copy of Rate of notice if home owner
- Description of finance goods
- ❖ Copy of car sales contract / Invoice (quotation) of equipment
- ❖ Registration Paper & vendor's driver' licence if private sales