

## Executive Brief – Loan Scenarios

<b>Originator Details</b>	Contact Name: _____  Company: _____  Phone: _____ Fax: _____  Mobile: _____ Email: _____	
<b>Borrower Detail</b>	Borrower's Name: _____  Guarantor's Name/s: _____  Address: _____  Phone: _____ Fax: _____  Mobile: _____ Email: _____	
<b>Security Details</b>	Commercial / Retail / Industrial / Residential / Rural / Specialised / Vacant Land / Other  Zoning: _____ Current Valuation/Real Estate Appraisals:\$ _____  Description of Property: Residential - House  Address: _____  Tenanted: Yes / No Term of Lease: _____  Details Of Tenant: _____	
<b>Loan Type</b>	Full Doc / Low Doc / No Doc / Asset Loan / 2 <sup>nd</sup> Mortgage / Caveat / other	
<b>Loan Amount</b>	\$ _____	LVR % _____
<b>Loan Structure</b>	Principal & Interest / Interest Only  Variable / Fixed Rate: _____ Loan Term Year(s) _____ months _____	
<b>Use of Funds</b>	Purchase / Refinance:  Current Lender(s) _____  Liability \$ _____ Estimated Valuation \$ _____  Cash Out / Working Capital / Equity Release / Other	
<b>Income</b>	Annual Income \$ _____ Investment Income \$ _____ Other Income \$ _____ <b>TOTAL</b> \$ _____	
<b>Credit History</b>	Clean / Impaired/ Defaults/ Writs/ Judgements/ Bankrupt/ Administration/ Liquidation <b>Itemise and Detail Impairments:</b>	
<b>Finance &amp; Settlement Date</b>	Finance Date: _____  Settlement Date: _____	

<b>Overview and Comments</b>	
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## **SUPPORTING DOCUMENTATION**

### **DEVELOPMENT FUNDING**

1. Completed Loan Application
2. Full Assets and Liabilities – Company & Personal
3. Corporate Structure
4. Copy of Signed and Dated Sale/Purchase Contract by both parties
5. Copy of DA (Development Approval) from Council
6. Copy of BA (Building Approval) from council, if available
7. Current Valuation Report, preferably LMW, HTW, CBRE
8. Copy of QS (Quantitative Surveyors) Report – Napiers & Blakeley OR Rider Levett Bucknall
9. Feasibility/Cashflow of Project
10. Council Approved Plans & Specifications
11. Council Operational Works Certificate
12. Architects Drawings
13. Engineers Report
14. Corporate Profile / CV of Developer
15. CV of Builder & Project Manager
16. List of Developments Completed

**NOTE: Please ensure that all the requested information has been provided to ensure an accurate and prompt response from our Credit Department.**