

Commercial Solar & Energy Application Form

Available to commercial and business clients seeking to finance:

- PV solar and equipment
- Batteries and storage
- Lighting and LED
- Power Factor Correction
- Heating
- Cooling
- Air
- Pumps
- Vehicles, machinery and more

Application Requirements:

Please complete the attached form in full and sign pages 2 and 3.

Please send latest council rates notice for business property and/or residential properties to confirm ownership.

Trusts - please email a copy of the Trust Deed.

Financials - for loans over \$50k please email the last two years business financials and company tax returns.

Note: Solar & Energy Finance service fee of \$295 applies to all commercial applications

Please email all applications to todd@finance.energy

COMMERCIAL CREDIT APPLICATION

Cost of goods including GST: \$		Loan required including GST: \$		Loan term in years:						
				1	2	3	4	5	6	7
Chattel Mortgage		Rental		Supplier/Installer:						
Business/Trust name:								Start Date: / /		
Trading name:						A.B.N: / / /				
Business Address:								Postcode:		
Trust Beneficiary: (1)				Trust Beneficiary: (2)						
Are business premises/installation site: Leased				Owned				Business Ph:		
Business Email Address:										
Description/ Nature of Business:										
Estimated Annual Turnover:		Under \$50k		\$50k - \$100k		\$100k - \$250k		\$250k - \$1m		\$1m plus
Trade/Current Supplier Reference:										
Company Name:				Contact Person:				Phone:		
Your Accountant:				Contact Person:				Phone:		
Name:										
Contact Person:										
Phone:										
APPLICANT/DIRECTOR 1						APPLICANT/DIRECTOR 2				
Full Name:						Full Name:				
Date of Birth: / /						Date of Birth: / /				
Drivers Licence No:						Drivers Licence No:				
Home Street Address:						Home Street Address:				
Suburb:			Postcode:			Suburb:			Postcode:	
Time at address:		Years		Months		Time at address:		Years		Months
Home owner		Mortgaged		Renting		With family		Home owner		Mortgaged
Renting		With family		Home owner		Mortgaged		Renting		With family
Mobile Phone:						Mobile Phone:				
YOUR ASSETS						YOUR LIABILITIES				
Commercial Buildings Value:						Business Loans Owing:				
Residential Property Total Value:						Residential Loans Owing:				
Other Business Assets/Goodwill:						Business Overdraft Limit:				
Vehicles Total Value:						Vehicle Leasing/Loans Owing:				
Cash In Bank:						Other Loans Owing:				
Superannuation:						Credit Card Balance Owing:				
Contents/Valuables:						Other Debts Owing:				
TOTAL ASSETS:						TOTAL LIABILITIES:				

Applicant 1 Sign: _____

Applicant 2 Sign: _____

Date: _____

Date: _____

Name of Broker (we, us, our)	Solar & Energy Finance; ACL 392748 Todd O'Brien - Director todd@finance.energy Phone 1300 619 998
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We need to collect personal information about you to provide you with our broking & related services. This privacy statement tells you how we collect your information, what we use the information for and who we share the information with. If we collect information that can be used to identify you, we will take reasonable steps to notify you of that collection.

How information is collected from you - We will collect your information from you directly whenever we can, like from enquiries we make of you when you seek credit assistance from us. We may verify that information from sources referred to in the responses to those enquiries or in this privacy statement.

How information is collected from other sources - Sometimes we will collect information about you from other sources as the Privacy Act 1988 permits. We will do this only if it's reasonably necessary to do so, for example, where:

- We collect information from third parties about a loan or lease in relation to which you seek our services;
- We can't get hold of you and we rely on public information to update your contact details; or
- We exchange information with your legal or financial advisers or other representatives.

When the law authorises or requires collection of information - Some law may require us to collect personal information about you. For example, we may require your information to verify your identity under Australian Anti-Money Laundering law.

How your information may be used - We may use your information for purposes including:

- Giving you credit assistance;
- Giving you information about loan products or related services;
- Considering whether you are eligible for a loan or lease or any related service you requested;
- Assisting you to prepare an application for a lease or a loan;
- Administering services we provide, for example, to answer requests or deal with complaints;
- Administering payments we receive, or any payments we make, relating to your loan or lease;
- Identifying you;
- Telling you about other products or services we make available and that may be of interest to you, unless you tell us not to;
- Telling you about other suppliers, with whom we have arrangements, that supply goods or services that may be of interest to you;
- Allowing us to run our business efficiently and perform general administrative tasks;
- Preventing or investigating any fraud or crime or any suspected fraud or crime;
- As required by law, regulation or codes binding us; and any purpose to which you have consented.
- You can let us know at any time if you no longer wish to receive direct marketing offers from us. We will process your request as soon as practicable.

What happens if you don't provide information? - If you don't provide your information to us, it may not be possible to:

- Assist in finding a loan or lease relevant to your circumstances;
- Verify your identity or protect against fraud; or
- Let you know about products or services that might be suitable for your financial needs.

Sharing Your Information - General - We may use and share your information with other organisations for any purpose described above. These may include our commercial finance partners Evergreen Finance Company Pty Ltd ABN 35 126 481 865 (Australian Credit License 392570), Macquarie Leasing, SELFCO Leasing, Thorn Equipment Finance and others. **Sharing with your representatives and referees** - We may share your information with:

- Your representative or any person acting on your behalf (for example, lawyers, settlement agents, accountants or real estate agents); and
- Your referees, like your employer, to confirm details about you.

Sharing with third parties - We may share your information with third parties in relation to services we provide to you or goods or services in which we reasonably consider you may be interested. Those third parties may include:

- The mortgage aggregator through whom we may submit loan or lease applications to lenders or lessors on the mortgage aggregator's panel;
- The Australian Credit Licence holder that authorises us to engage in credit activities; Referrers that referred your business to us;
- Financial services suppliers with whom we have arrangements, including our finance partners SELFCO Leasing, Macquarie Energy Leasing, Evergreen Finance Company Pty Ltd ABN 35 126 481 865 (Australian Credit License 392570), Thorn Equipment Finance and others;
- Lenders, lessors, lender's mortgage insurers and other loan or lease intermediaries;
- Organisations, like fraud reporting agencies, that may identify, investigate and/or prevent fraud, suspected fraud, crimes, suspected crimes, or other misconduct;
- Government or regulatory bodies as required or authorised by law. In some instances, these bodies may share the information with relevant foreign authorities;
- Guarantors and prospective guarantors of your loan or lease;
- Service providers, agents, contractors and advisers that assist us to conduct our business;
- Any organisation that wishes to take an interest in our business or assets; and any third party to which you consent to us sharing your information.

Sharing outside of Australia

We are not likely to disclose your information to organisations overseas. However, we may store your information in cloud or other types of networked or electronic storage. As electronic or networked storage can be accessed from various countries via an Internet connection, it's not always practicable to know in which country your information may be held. **Privacy Policy** You can find out more about how we manage your information by reading our Privacy Policy available by contacting us. Please see our contact details above. [Also, you can read and obtain a copy of that policy at our website address set out above.] Our Privacy Policy sets out how you can ask us to access and seek to correct information we hold about you and how you may complain against us about a privacy issue.

Information about other people If you give information to us about another person (like your co-applicant) in relation to the services we provide, you will let that other person know that:

- We have collected their information to provide those services or for any other purpose set out in this privacy notice;
- We may exchange this information with other organisations set out in this privacy notice;
- We handle their personal information in the way set out in our Privacy Policy and this privacy notice and they can;
- Access or request a copy of that privacy policy or this privacy notice; or access the information we hold about that other person,
- By using our contact details above; and we may not be able to provide those services to you unless we obtain their information.

Applicant / Director / Guarantor (1)	Applicant / Director / Guarantor (2)
Signature:	Signature:
Name:	Name:
Date:	Date: