

Commercial Solar Loan Application 2021

Documents required with all new applications

So we can process your application promptly, please send us the following items

- This Application Form*** – pages 2 and 3 fully completed and signed
- Council Rates Notice*** – a copy of your latest council rates notice {for any property type} to confirm that one Director/ Partner / Borrower is a current property owner
- Driving licence*** - for all applicants, a clear colour copy of the front and back
- Trusts*** – if the borrower is a Trust, a copy of the signed Trust Deed including the Schedule

Please email the completed application form and all documents to todd@finance.energy

Finance is available to Commercial and Business customers for:

- PV solar systems and equipment
- Solar storage and batteries
- Hybrid and off-grid systems
- Lighting and LED
- Power factor correction and Voltage Optimisation
- Heating
- Cooling
- Air conditioning
- Pumps and irrigation
- Vehicles
- Machinery and equipment
- Tractors, bobcats, forklifts, excavators

COMMERCIAL CREDIT APPLICATION – please complete all sections in full

| | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|----------------------------------|
| Loan required including GST \$ | Solar supplier | | | |
| <input type="checkbox"/> Chattel Mortgage <input type="checkbox"/> Rental | Preferred loan term {in years} please tick <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 | | | |
| Business name in full | | | | |
| ABN | Length of time in business | | years months | |
| Business trading address | | | Time at address years | |
| Solar installation address | | | <input type="checkbox"/> Owned <input type="checkbox"/> Leased | |
| Business email | | | Business ph. | |
| Description or Nature of your business | | | | |
| APPLICANT DIRECTOR PARTNER {1} | | APPLICANT DIRECTOR PARTNER {2} | | |
| <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/> Other | | <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/> Other | | |
| First name | | First name | | |
| Middle names | | Middle names | | |
| Surname | | Surname | | |
| Date of birth / / | | Date of birth / / | | |
| <input type="checkbox"/> Married <input type="checkbox"/> Defacto <input type="checkbox"/> Single <input type="checkbox"/> Widowed <input type="checkbox"/> Other | | <input type="checkbox"/> Married <input type="checkbox"/> Defacto <input type="checkbox"/> Single <input type="checkbox"/> Widowed <input type="checkbox"/> Other | | |
| No. of dependant children | | No. of dependant children | | |
| Driving licence no | | Driving licence no | | |
| 10-digit licence card no {NSW only} | | 10-digit licence card no {NSW only} | | |
| Mobile number | | Mobile number | | |
| Home address | | Home address | | |
| Suburb | Postcode | Suburb | Postcode | |
| <input type="checkbox"/> Freehold <input type="checkbox"/> Mortgaged <input type="checkbox"/> Renting <input type="checkbox"/> With family | | <input type="checkbox"/> Freehold <input type="checkbox"/> Mortgaged <input type="checkbox"/> Renting <input type="checkbox"/> With family | | |
| Time at address years months | | Time at address years months | | |
| < 3 yrs prev address | | < 3 yrs prev address | | |
| Time at previous address years months | | Time at previous address years months | | |
| ASSETS YOU OWN | | LIABILITIES & LOANS YOU OWE | | MONTHLY PAYMENT |
| Your residence | \$ | Home loans | \$ | \$ |
| Commercial property total | \$ | Commercial loans | \$ | \$ |
| Investment property total | \$ | Investment loans | \$ | \$ |
| Total cash in bank | \$ | Vehicle leases | \$ | \$ |
| Vehicles & Machinery | \$ | Other loans | \$ | \$ |
| Business value/ Goodwill | \$ | Personal loans | \$ | \$ |
| Superannuation | \$ | Credit cards limits | \$ | Owing \$ \$ |
| Home contents/Other assets | \$ | Overdraft limit | \$ | Owing \$ \$ |
| Note: If the Applicants are <u>not</u> married or defacto, please complete a separate Assets & Liabilities page for each Applicant | | | | |

| | |
|----------------------------------------------------|----------------------------------------------------|
| APPLICANT DIRECTOR PARTNER {1} | APPLICANT DIRECTOR PARTNER {2} |
| Signature | Signature |
| Full name | Full name |
| Date / / | Date / / |

Privacy Consent Information

Broker Name (we, us, our) Financial Destiny P/L T/A Solar & Energy Finance ACL 392748. Director – Todd O’Brien email todd@finance.energy Phone 1300619998

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 is 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 cannot 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 and / or identifying you
- Giving you information about loan products or related services
- Considering whether you are eligible for a loan/lease or any related service you requested or 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
- 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 do not provide information? - If you do not provide your information to us, it may not be possible to:

- Assist in finding a loan or lease relevant to your circumstances and/or 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 – We may use and share your information with other organisations for any purpose described above. These may include our commercial finance partners Macquarie Equipment Rentals, Macquarie Energy Leasing, Vestone Capital Pty Ltd, SELFCO Leasing, Capital Finance, Pepper, Firstmac, International Acceptance Group, TPC Finance, 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
- Financial services suppliers with whom we have arrangements, including our finance partners Macquarie Equipment Rentals, Macquarie Energy Leasing, Vestone Capital Pty Ltd, SELFCO Leasing, Capital Finance, Pepper, Firstmac, International Acceptance Group, TPC Finance, 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, or prevent fraud, suspected fraud, crimes, suspected crimes, other misconduct
- Government 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, or 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 is 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 persons 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 PARTNER {1} | APPLICANT DIRECTOR PARTNER {2} |
|------------------------------------|------------------------------------|
| Signature: | Signature: |
| Name: | Name: |
| Date: | Date: |