



# Request to increase Facility limit

Please use blue or black pen and write in BLOCK LETTERS

Send to: NAB Equity Lending or fax to: **1300 739 923**  
 PO Box 5350  
 Melbourne Vic 3001 or email to: equity.lending@nab.com.au

Attention  
 NAB Equity Lending contact name  
 \_\_\_\_\_

## Facility details

Client/Facility name \_\_\_\_\_ Facility number \_\_\_\_\_

## Facility limit request

Current Facility limit \$ \_\_\_\_\_ Requested amount of increase \$ \_\_\_\_\_ Requested new Facility limit \$ \_\_\_\_\_

Please increase:

- Current variable rate loan
- New variable rate loan
- Additional fixed rate loan

### Fixed interest rate annually in advance

Term of loan

- 1 year  2 years  3 years  4 years  5 years

### Fixed interest rate monthly in arrears

Term of loan

- 1 year  2 years  3 years  4 years  5 years

Are you providing additional security to support your request for an increase to your Facility limit?

- Yes  No

If yes, please also complete and submit the form titled 'Security/managed fund transfer instruction'.

## Financial Information

Please complete the following to enable us to assess your request for an increase to your Facility limit.

### Part A

#### Income and expenses

First applicant/First Director				Second applicant/Second Director			
Net Income (Monthly)		Expenses (Monthly)		Net Income (Monthly)		Expenses (Monthly)	
Employment income	\$	Mortgage payments	\$	Employment income	\$	Mortgage payments	\$
Rental income	\$	Lease payments	\$	Rental income	\$	Lease payments	\$
Investment income (including dividends and interest)	\$	Loan payments	\$	Investment income (including dividends and interest)	\$	Loan payments	\$
Other income	\$	Credit card payments	\$	Other income	\$	Credit card payments	\$
		Existing margin loan payments	\$			Existing margin loan payments	\$
		Other expenses	\$			Other expenses	\$
<b>Total income</b>	<b>\$</b>	<b>Total expenses</b>	<b>\$</b>	<b>Total income</b>	<b>\$</b>	<b>Total expenses</b>	<b>\$</b>

For verification purposes, please provide us with evidence of your annual income (e.g. copies of two payslips from the past three months, or a copy of your most recent tax return).

### Part B

#### Financial statements

Provide the following information from the latest end of financial year Financial Statements, as prepared by your Accountant/Taxation adviser.

Financial Year that this information relates to: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Total Income/Revenue/Sales: \$ \_\_\_\_\_

Total Net Profit (Loss) before tax \$ \_\_\_\_\_

**Part C**

**Assets and liabilities**

Where there is more than one person providing details, please complete Part C on a combined basis or attach supplementary information to this page.

Assets		Liabilities	
Residential property % owned: _____%	\$	Residential property mortgage	\$
Investment property(ies) % owned: _____% Number:	\$	Investment property(ies) mortgage	\$
Motor vehicles % owned: _____% Number:	\$	Car loan(s)	\$
Existing share portfolio (not including superannuation) % owned: _____%	\$	Existing margin loan(s)	\$
Cash	\$	Credit/store cards balance	\$
Share of company/business (if any)	\$	Other loans	
Other assets	\$	Other expenses	\$
_____	\$	_____	\$
_____	\$	_____	\$
<b>Total assets</b>	<b>\$</b>	<b>Total liabilities</b>	<b>\$</b>

**Additional information**

Have you taken out a loan to fund the increased equity contribution for this margin loan?  No  Yes (if 'yes', provide details below)

Was the loan secured against your primary residential property?  No  Yes

Amount borrowed: \$ \_\_\_\_\_

Are you a "wholesale" investor (as defined under Section 761G of the Corporations Act 2001)?  No  Yes

**Applicant signatures**

I/We consent to companies of the National Australia Bank Group using and disclosing my/our personal information as contemplated in the section titled 'Your personal information and privacy' in the NAB Equity Lending Facility Terms.

I/we acknowledge that I/we have not been given or relied upon any financial advice or recommendation about the Facility (including any specific stock or managed fund investment) from NAB Equity Lending, a division of National Australia Bank Limited.

NAB recommends that you seek independent legal, tax and financial advice on the suitability of the Facility (including a product if relevant) for you.

**Individual/Joint**

Signature – first applicant



Full name \_\_\_\_\_

Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Contact number \_\_\_\_\_

Signature – second applicant



Full name \_\_\_\_\_

Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Contact number \_\_\_\_\_

**Company applicant\***

Executed by

Name of company and ABN \_\_\_\_\_

in accordance with subsection 127 (1) of the Corporations Act by authority of its director(s).

Signature of authorised person



Full name \_\_\_\_\_

Office held (Director/Secretary) \_\_\_\_\_

Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Contact number \_\_\_\_\_

Signature of authorised person



Full name \_\_\_\_\_

Office held (Director/Secretary) \_\_\_\_\_

Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Contact number \_\_\_\_\_

\* If the company applicant is a proprietary company with a sole director who is also the sole company secretary, that person states that they sign as both the sole director and the sole company secretary. In all other cases, this application should be signed by two directors or a director and company secretary.