



NAB Margin Loan

Request to increase facility limit

Please complete Application form in full in black or blue pen using CAPITAL LETTERS and ☒ where appropriate.

Email the completed form 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

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)		
Salary	\$	\$
Rental income	\$	\$
Investment income (including dividends and interest)	\$	\$
Other income	\$	\$
Total income	\$	\$

Expenses (monthly)		
Mortgage payments (residential)	\$	\$
Mortgage payments (investment property)	\$	\$
Rental payments	\$	\$
Loan/other payments	\$	\$
Credit or store card payments	\$	\$
Existing margin loan repayments	\$	\$
Utility bills	\$	\$
Groceries	\$	\$
Transport	\$	\$
Medical	\$	\$
Insurance	\$	\$
Health and fitness	\$	\$
Entertainment	\$	\$
Other	\$	\$
Total expenses	\$	\$

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 value (full value of asset)	\$	Residential property mortgage	\$
Investment properties (full value of assets)	\$	Investment property(ies) mortgage	\$
Motor vehicles	\$	Car loans	\$
Existing share portfolio (not including superannuation)	\$	Existing margin loans limit	\$
Cash	\$	Credit/store cards limit	\$
Share of company/business (if any)	\$	Other loans	
Other assets	\$	Other liabilities	\$
	\$		\$
	\$		\$
Total assets	\$	Total liabilities	\$

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 NAB does not provide any financial advice or recommendation about the Facility (including any specific stock or managed fund investment) which may be accessed via the facility.

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

Full name

Full name

Signature – first applicant

✗

Date

/ /

Signature – second applicant

✗

Date

/ /

Contact number

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).

Full name

Full name

Signature of authorised person

✗

Date

/ /

Signature of authorised person

✗

Date

/ /

Office held (Director/Secretary)

Office held (Director/Secretary)

Contact number

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.