

APPLICATION FORM

Division 7A Compliant Facility/Loan Agreement

Please read the following before completing this application form.

The Division 7A Facility/Loan Agreement only relates to the provision of cash advances. It does not cover any unpaid present entitlements that are required to be compliant with Taxation Ruling TR 2010/3 and Practice Statement Law Administration PS LA 2010/4. If you require a Facility/Loan Agreement that documents unpaid present entitlements, please contact us.

If you have any questions about completing the application form please contact:

Christopher Davis
Principal

Phone: (07) 3014 6530

Email: cdavis@mcw.com.au

Taryn Hartley
Principal

Phone: (07) 3014 6513

Email: thartley@mcw.com.au

Please ensure you complete all details below, and contact us with any questions you have prior to submitting the form.

PRICES

All prices are for email delivery only. Please mark the relevant box if documents are required in hard copy

| | |
|---|---|
| Division 7A Compliant Facility Agreement (7 years) only (1- 2 day turnaround) | \$300 plus GST |
| Division 7A Compliant Facility Agreement (25 years) plus security, including: | \$1,250 plus GST plus Land Titles Office fees TBC |
| a. mortgage; | |
| b. registration of the mortgage at the Land Titles Office in Queensland; and | |
| c. Land Titles Office registration fee for lot/s (TBC). | |
| Division 7A Compliant Loan Agreement (7 years) only | \$300 plus GST |
| Division 7A Compliant Loan Agreement plus security, including: | \$1,250 plus GST plus Land Titles Office fees TBC |
| a. mortgage; | |
| b. registration of the mortgage at the Land Titles Office in Queensland; and | |
| c. Land Titles Office registration fee for lot/s (TBC). | |
| Documents in hard copy | Express Post - \$15 Courier - TBC |

PURCHASER/ADVISER'S DETAILS

Firm name

Contact name

Telephone

Fax

Email address

Delivery address for documents

Suburb/City

State

Postcode

DETAILS OF LENDER

Full name of Company

ACN

ABN

Registered office address

Suburb/City

State

Postcode

DIRECTORS OF LENDER

Full name

Address

Suburb/City

State

Postcode

Full name

Address

Suburb/City

State

Postcode

DETAILS OF BORROWER/S - INDIVIDUALS

Individual borrower 1

Full name

Address

Suburb/City

State

Postcode

Individual borrower 2

Full name

Address

Suburb/City

State

Postcode

Individual borrower 3

Full name

Address

Suburb/City

State

Postcode

Individual borrower 4

Full name

Address

Suburb/City

State

Postcode

DETAILS OF BORROWER - TRUST

Please attach a copy of the current trust deed to this application form

Name of trust

Date of settlement of the trust

Have there been any variations to the trust deed?

Date

Document title

Please provide details of all variations to the trust deed and attach copies of these documents

Date

Document title

Date

Document title

Details of corporate trustee

Full name of corporate trustee

ACN

ABN

Registered office address

Suburb / City

State

Postcode

Phone number

Fax number

Details of directors of corporate trustee

Full name

Address

Suburb/City

State

Postcode

Full name

Address

Suburb/City

State

Postcode

Details of individual trustees

Full name

Address

Suburb/City

State

Postcode

Full name

Address

Suburb/City

State

Postcode

Full name

Address

Suburb/City

State

Postcode

Full name

Address

Suburb/City

State

Postcode

LOAN DETAILS

Amount of money being lent

Financial year in which the loan was made

Duration of loan

Note: the maximum term for the loan is 25 years where the loan is secured by a mortgage over real property and at the date of the loan the market value of the property is at least 110% of the amount of the loan or, otherwise, 7 years.

Secured (25 years)

Unsecured (7 years)

State or Territory of registration of lender

Interest Rate

Note: the **Income Tax Assessment Act 1936** (Cth) requires the interest rate to be equal to or exceed the benchmark interest rate

Benchmark

Other (please specify):

SECURITY DETAILS

Registered owner of the property

Property description

Lot

Plan

Title Reference

Is there an existing mortgage registered over the property?

Yes

No

If yes, is the mortgagee's consent to the second mortgage required under the loan documents

Yes

No

Is there a certificate of title on issue for the property

Yes

No

If yes, who holds to certificate of title

First mortgagee

Registered owner

Other, please specify

If required, please provide contact details for the first mortgagee (e.g. if consent is required or if first mortgagee holds certificate of title)

Please note, the prices excluded liaising with mortgagees or third parties who hold a certificate of title or whose consent is required.

RETURNING THIS FORM

After completing this form please either:

- print, sign, and fax it to McInnes Wilson Lawyers at (07) 3221 2921; or
- print, sign, scan, and email it to McInnes Wilson Lawyers at mcwonline@mcw.com.au; or

To print this form for signing click here:

To email this form to McInnes Wilson Lawyers, after confirming instructions below, click here:

CONFIRMATION OF INSTRUCTIONS

The purchaser / adviser agrees to purchase the goods and services indicated on this application form. The purchaser / adviser and/or the company and the borrowers acknowledge that no legal or financial advice has been given by McInnes Wilson Lawyers in relation to the loan, the security or otherwise.

| | | | |
|------|-------------------|----|------|
| Name | Sign/Confirmation | or | Date |
| Name | Sign/Confirmation | or | Date |
| Name | Sign/Confirmation | or | Date |
| Name | Sign/Confirmation | or | Date |

CREDIT CARD PAYMENTS

Please debit the following credit card for the supply of goods and services indicated on this application form.

Note: Payment by credit card will incur a fee of 1.07% (incl GST) for VISA and Mastercard and 3% (incl GST) for AMEX, on the GST inclusive price.

Credit card:

Visa
 Mastercard
 American Express

Total Remitted: \$

Expiry date:

plus credit card fee specified above

Cardholder's Name:

Card Number:

Cardholder's Signature:

Date: