

Increase Credit Limit Request

Complete this form using **black ink**, CAPITAL LETTERS and mark [x] in the appropriate boxes.

- This Request for a Credit Limit Increase must be completed and signed by all Borrowers and Guarantors
- Can be used for the Ord Minnett Margin Loan Facility

1 Facility Details

Loan Account Name

Loan Account Number

Current Credit Limit

New Credit Limit

2 Contribution from Borrower (mandatory)

A	Refinance from another margin loan	Either complete a Refinance Authority or if it is an existing Facility with the Lender provide the facility number. <input type="text"/>	
B	Cash Contribution	\$	
C	Debit Nominated Account	\$	The Lender is authorised to debit the Nominated Account for this amount.
D	Market Value of Securities	\$	If you have existing listed securities or managed funds that you are providing in addition to your existing Margin Loan Facility.

Are you using a mortgage over your primary residential property to fund any of the contributions? Yes No

3 Contribution from Director Guarantor

Director One

A	Cash Contribution	\$	
B	Market Value of Securities	\$	If you have existing listed securities or managed funds that you are providing as part of a secured portfolio for a Margin Loan Facility.

Are you using a mortgage over your primary residential property to fund any of the contributions? Yes No

Director Two

A	Cash Contribution	\$	
B	Market Value of Securities	\$	If you have existing listed securities or managed funds that you are providing as part of a secured portfolio for a Margin Loan Facility.

Are you using a mortgage over your primary residential property to fund any of the contributions? Yes No

4. Expected Investment Parameters

Provide details of the investment portfolio that is intended to be held under the Facility.

No changes to my current Investment parameters (Move to section 5).

The type of Acceptable Investment in the Secured Portfolio will consist of:

Only ASX listed, or
 Managed Funds representing % of the Secured Portfolio

The largest single Acceptable Investment of the Secured Portfolio will be:

Less than 20%; or Between 20% and no more than 40%; or
 More than 40% but less than 70%; or Greater than 70%

The majority of Acceptable Investments in the Secured Portfolio will be invested:

Within the ASX Top 50; or The ASX Top 200; or Outside of the ASX Top 200

The amount you intend to borrow expressed as a percentage of the Market Value of the Secured Portfolio will be greater at a Gearing Ratio of:

Less than 30%; or Between 30% and no more than 50%; or
 More than 50% but less than 70%; or Greater than 70%

5. Borrower Finances (mandatory)

Depending on the Credit Limit requested and the expected investment parameters, Borrowers may be required to provide information beyond what is specified below. The Lender will contact you in this instance.

Tick One Box	Borrower Type	Action
<input type="checkbox"/>	A company Borrower	The Company Directors are required to complete all information in section 5. Copies of the supporting documentation must be included with the Increase Credit Limit Request Form.
<input type="checkbox"/>	A trustee on behalf of the trust	The Individual Trustees or the Directors of a Corporate Trustee are required to complete all information in section 5. Copies of the supporting documentation must be included with the Increase Credit Limit Request Form.
<input type="checkbox"/>	An individual Borrower or joint Borrower AND both are wholesale clients.	Check with your accountant about providing an Accountant's Declaration as evidence of your status as a wholesale client. If a valid Accountant's Declaration is included with this form then no further information is required. Where the Loan Account is in joint names or a company name, we will need a separate certificate for each person/director.
<input type="checkbox"/>	All other Borrowers who do not meet any of the categories above.	Complete all information in this section. Copies of the supporting documentation must be included with this form.

Supporting Documentation (the following list is the **minimum supporting documentation** required).

Income

Borrower Type	Requirements (copies only, certification is not required)
Salaried	Two most recent pay slips, OR most recent PAYG payment summary, OR most recent tax return including notice of assessment.
Self employed	Two most recent tax returns including notice of assessment, AND copy of signed business accounts showing last 2 years.

Assets

Borrower Type	Requirements (copies only, certification is not required)
All	Most recent statement for cash and cash like investments. The copy must show the name of the financial institution or issuer of the investment, the account holder name and the current balance. If you own residential (owner occupied or investment) property, then the most recent rates notice.

5.1 Borrower's Dependants

Indicate the dependants of the Borrower(s). This includes any children or adults who depend on the Borrower's income.

Ages of each Adult dependant

Ages of each Child dependant

5.2 Borrower's Net Income Statement

This is the total annual income and commitments for the Borrower's household. All income is shown pre-tax. Salaries should be net of any salary sacrifice for superannuation or other benefits.

Annual Income		Annual Commitments	
Salary Individual/Director/Trustee Borrower 1	\$	Residential Rent or Mortgage	\$
Occupation Individual/Director/Trustee Borrower 1			
Salary Individual/Director/Trustee Borrower 2	\$	Residential Expenses (for example rates, strata, utilities, maintenance costs)	\$
Occupation Individual/Director/Trustee Borrower 2			
Rental Income	\$	Investment Property Mortgage	\$
Investment Income	\$	Investment Property Expenses (for example rates, strata, utilities, maintenance costs)	\$
Interest Income	\$	Other loan payments/payment plans (for example personal loans, buy now pay later plans)	\$
Business Profits	\$	Lease payments	\$
Other Income	\$	Investment Loan	\$
		Household Living Expenses*	\$
Total	\$		\$

*All Borrowers are required to state their personal annual household expenses that will continue after this Request is approved. Household Living Expenses does not include information that has been provided above. Examples of household expenses include but are not limited to; vehicle registration, fuel, public transport, groceries, clothing, internet and digital subscriptions, education, childcare fees, insurance (home, contents, vehicle, health etc), medical/health, entertainment and holidays.

Do you share income and expenses with any other person?

5.3 Borrower's Balance Sheet

List the assets and liabilities of the Borrower(s) including any joint assets or liabilities.

Assets	Individual Borrower 1	Individual Borrower 2
Cash & cash-like investments	\$	\$
Residential Property (provide details below)		
Address:		
Residential Property (provide details below)		
Address:		
Shares / Managed Funds		
Details:		
Yield %		
Other Tangible Assets		
Provide Details:		
Superannuation	\$	\$

Liabilities	Individual Borrower 1	Individual Borrower 2
Residential Property Mortgage	\$	\$
Investment Property Mortgage	\$	\$
Motor Vehicle Lease/Loan	\$	\$
Investment Loans	\$	\$
Other Loans	\$	\$
Credit/Store Card Limits	\$	\$

6 Execution

Signature of Borrower

Print full name

Company/Trust: indicate capacity

Director
 Sole Director and Secretary
 Trustee

Date

 / /

Signature of Guarantor

Print full name

Company/Trust: indicate capacity

Director
 Sole Director and Secretary
 Trustee

Date

 / /

Signature of Additional Borrower

Print full name

Company/Trust: indicate capacity

Second Director
 Company Secretary
 Second Trustee

Date

 / /

Signature of Additional Guarantor

Print full name

Company/Trust: indicate capacity

Second Director
 Company Secretary
 Second Trustee

Date

 / /

Submit this form by:

Mail: Leveraged, GPO BOX 5388, Sydney NSW 2001
 Email: customerservice@leveraged.com.au

For any enquiries please contact the Customer Service Team on 02 8282 8251

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