

Increase Margin Loan Credit Limit

To request a Credit Limit Increase on your Margin Loan facility, please complete this form.

Please use black ink and BLOCK letters.

Facility Name

Facility Number

Current Approved Credit Limit \$, , .

New Credit Limit \$, , .

Please note: If you are applying for a credit limit and your aggregate loan amount is above **\$3 million**, you must complete the attached Statement of Financial Position.

In addition, for aggregate loan amount limits above \$3 million, with portfolios not meeting the Lender's diversification criteria or for aggregate loan amount limits above \$10 million, you must supply verification of income and net assets in the form of the following documentation:

- **Verification of income** - please provide a Group Certificate, or Tax Return, employer declaration or letter from accountant or Financial Adviser. If self-employed, a copy of signed business/company accounts showing the last two years' details.
- **Verification of assets** - please provide copies of stock holding certificates, bank statements, or a letter from your accountant or Financial Adviser.
- **If a company/trust**, please provide Financial Statements (signed copies of the Balance Sheets and the Profit and Loss Statements for the last two years of a company or a Trust, signed by an authorised officer, and confirmation of income for directors).

Acknowledgements

I/we acknowledge and declare that I/we have read, understood and agree to the details above.

Borrower 1 / Director 1 / Sole Director

Borrower 2 / Director 2 / Secretary

Authorised Signature(s)

Please Print Name(s)

Date / /

Date / /

Please ensure you complete the included Statement of Financial Position if you are applying for a credit limit and your aggregate loan amount is above \$3 million.

Please complete and return to:

Leveraged Equities
GPO Box 5388, SYDNEY NSW 2001

Fax: 02 8282 8383

L11 10/09

If you require any assistance, please contact our Client Service Team on 1300 307 807 or email info@leveraged.com.au

In addition, for aggregate loan amount limits above \$3 million with portfolios not meeting the Lender's diversification criteria, you must supply verification of income and net assets in the form of the following documentation:

Verification

Income Verification

Applicant Type

Documentation requirements

Individual salaried borrower	2 most recent group certificates, tax returns or pay slips.
Individual self employed borrower	2 most recent tax returns and a copy of signed business/ company accounts showing the last 2 years' details.
Director of Company Applicant	2 most recent group certificates or tax returns.

Asset Verification

Applicant Type

Documentation requirements

Individual borrower	Copies of stock holding statements, bank statements or a letter from your accountant.
Company or Trust	Financial Statements (Balance Sheet and Profit and Loss Statements) for the last 2 years signed by an authorised officer.

Acknowledgements

I/we agree and acknowledge that:

- I/we have read and understood the credit assessment policy as outlined above and declare that any financial information provided is true and correct;
- If I/we do not provide assessment details, the Lender cannot and will not assess my/our ability to meet my/our commitments under the Loan and Security Agreement;
- If I/we do provide assessment details, a failure to maintain the account within the additional approval conditions or correct a failure in a timely manner, will result in a reduction of the lending ratio applicable to the portfolio and may result in a margin call being made.

Borrower 1 / Director 1 / Sole Director

Borrower 2 / Director 2 / Secretary

Authorised Signature(s)

Please Print Name(s)

Date / /

Date / /

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