|  |  |
| --- | --- |
| **Borrower/s:** | Family Investments Pty Ltd ATF Family Superfund |
| **Security Custodian:** | The name that is on the sales contract |
| **Guarantor/s:** | Directors of the company which should be the applicants |
|  |
| **Facility Limit:** |  |
| **Facility Type:** |  |
| **Interest Rate:** |  |
| **Loan Term:** |  |
| **Repayment Type:** |  |
|  |
| ***Security Type*** |  |  |
| Residential |  |  |
|  |  |
|  |  |
|  |  |
|  |  |

## PURPOSE OF LOAN

Clients are looking to purchase an investment property through their Self-Managed Super Fund. The property will have the certificate of occupancy completed in the next few weeks.

## BACKGROUND

 has been self-employed for over 13 years trading under the . This business is involved with providing advertising services and is owned 50% by Mr with income being distributed to the l Investment trust. Both Mr & Mrs receive distributions personally.

In addition to the above, the clients operate a partnership structure which manufactures electronic signs . This entity receives a management fee from the Unit Trust.

Over the years the clients have focused on personal debt reduction and building their business income. The clients have built their share portfolio and also made additional contributions into their self-managed superfund. The clients are seeking to diversify their super assets with the purchase of this investment property.

## TRANSACTION TABLE

Loan funds are to be used as follows:-

|  |  |
| --- | --- |
| Property Purcahse Price | $ 900,000 |
| Acquisition/Set Up Costs | $ 38,875 |
| ***TOTAL:*** | *$* ***938,875*** |
| Facility Limit Borrower's contribution: | $ 600,000$ 338,875 |
| ***TOTAL*** | *$* ***938,875*** |

# Clients have a clear Equifax report with no adverse history, funds to complete with a considerable balance remaining after settlement in both cash and shares.

Loan is Recommended.

Rocco Massaria

PS : Servicing Calculator shows $ 500,000 but I have factored in the extra $ 100,000 as other Loan repayment.

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