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PLEASE COMPLETE IN BLOCK CAPITALS

Organisation name:

Address (including postcode):

Postcode:

Tel:

Email:

Contact name
and position held:

Constitutional status
(e.g. Company Limited by Guarantee):

List Directors/Committee Members/Trustees. Please attach brief Pen Profiles:

Loan amount required:

Repayment term proposed / source of repayment:

Security offered (assets held and proposed as loan collateral):

Key activities/specific services provided:

Brief History and Geographical area served:

Loan purpose:

Existing bank balances/loans/HP etc:

New Jobs Created:

Current Jobs Retained:

PT

FT

2 Project Costs	Amount £
Item	
	Total £

3 Project Sources of Funding	Amount £
Source	
	Total £

Supporting Documents/information required:

- | | |
|---|--|
| <ul style="list-style-type: none"> • Business Plan (if any) • Latest Bank Statement/Credit Union (incl. loans) • Memorandum & Articles of Association/Rules/Certificate of Incorporation/Governing Documents/Trust Deeds • Last Three Years Audited Accounts/Record of Income and Expenditure • Three Year Income and Expenditure Projection | <ul style="list-style-type: none"> • Monthly Cashflow Projection (Bridging Loan) • Management Team Pen Profiles • Copy Funding Letters or Offer (if applicable) • Construction/Supplier Contract or Quotation (if applicable) • Copy Planning Permission/Building Control Certification (if applicable) • Copy Lease Agreement/Proof of Title • Social Impact Summary |
|---|--|

Signature 1:

Position held:
(e.g. Chairman, Secretary etc)

Signature 2:

Position held:
(e.g. Chairman, Secretary etc)

Signed on behalf of (Organisations Name):

Date:

DATA PROTECTION

Ulster Community Investment Trust (UCIT) may from time to time require you to provide certain information in order to assist UCIT in dealing with a loan application and/or a review of an existing facility. UCIT will process your personal data fairly and lawfully in accordance with the principles of the Data Protection legislation for the purposes of assessing funding applications (and related and ancillary facilities) from time to time offered by UCIT, and for reviewing existing funding arrangements (but not otherwise). We will not process any personal data for any purpose other than those expressly authorised by you.

You acknowledge and agree that in certain circumstances we may be obliged to disclose/share personal information relating to you to/with third parties, for example, in order to conform to any requirements of law or to comply with any legal and/or our business process, as well to protect and defend our rights or property, our funders and/or our other customers.

If at any time after giving us personal information you decide that you no longer wish us to hold or use this information, or in the case that the information becomes out of date, you are free to notify us, and we will remove or rectify the information within a reasonable time and in accordance with legislative requirements.

In recognition that UCIT will be relying on information and data provided by you, you undertake, warrant and represent that all such information and data supplied or disclosed to UCIT will be true and accurate in all material respects and no fact or matter not supplied or disclosed in that information or data, which might be reasonably be expected to be disclosed in or with it, will render the information or data supplied untrue, misleading, false or deceptive whether because of omission, ambiguity or any other reason. You further warrant that in providing or supplying information and data, you have full authority to do so and that such information and data is not being supplied in breach of any third party obligation.

DECLARATION

I have read and understand the above statements and consent to the use and disclosure of the personal data and information I provide as outlined above:

Name:

Date:

When this application form has been completed, please ensure it is signed and dated before posting it to Ulster Community Investment Trust (UCIT)

Loan Application Procedure

The Ulster Community Investment Trust (UCIT) lending process is simple and straightforward:

- Contact UCIT and speak to a business advisor.
- Using the UCIT website (www.ucitltd.com), download, complete and return an application form. The application form is also available in paper format by contacting a member of UCIT staff.
- To develop the proposal, a UCIT business advisor will contact you to arrange a visit to discuss your application further.
- When the proposal is completed, it will be submitted to the UCIT Lending and Investment Committee.
- If approved, a UCIT Letter of Offer, which sets out the terms and conditions of the loan, is issued to the borrower.

- Letter of Offer, if accepted, is signed and returned to UCIT by the borrower.
- Security conditions are put in place by both UCIT solicitors and the borrower's solicitors.
- Upon approval of security conditions, loan funds can be released.

If you require assistance at any time during the process, please contact a member of our team.

Application Form

It is important that you provide as much information as you can about your project in support of your application.

Please do not be deterred by the number of areas referred to in these guidelines. Some may not be fully relevant to your particular project.

- 1**
- Organisation name and contact details
 - Constitutional status
 - Principal officers
 - Key activities/specific services
 - Applicant history/geographical area served
 - Amount of loan applied for
 - Summary of loan purpose
 - Proposed repayment term
 - Security offered
 - Existing banking/borrowing arrangements
 - Current/new job rates

2 Capital requirements

- Project costs
- TOTAL

3 Source of funds

- Project sources of funding
- TOTAL

Supporting documents/information

Such as:

- Past 3 years audited accounts
- Consultancy/Business plan
- Letters of offer from grantors
- Letters of interest from potential lessees
- Memorandum and Articles of Association or Constitution, Certificate of Incorporation etc
- Any other information, which you feel is relevant to the loan application

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