

Loan Application

[PART A] Summary Information



Financing
Social
Enterprise

Part A is intended to capture contact details and summary information only.

Organisation name

Address (inc postcode)

Tel
Fax
Email

Contact name
Position held

Constitutional status (eg Company Limited by Guarantee)

Principal officers and titles/roles

Main objectives/key activities

Applicant history/geographical area served
--

Loan amount required

Loan purpose

Repayment term proposed/source of repayment

Security offered (please indicate assets held and proposed as loan collateral)
--

Existing bank balances/loans/HP etc

[PART B] Business Project / Plan

In the absence of your own business plan and with the aid of the accompanying UCIT Application Guidelines and various topic headings below, please elaborate, where appropriate, on the information given in PART A of this application. Please arrange to sign by relevant Directors or Officials as detailed below and send a printed copy to UCIT.

Introduction and project summary

Company or association information

Product or service definition

Market information

Market objectives

Strategy and implementation

Management and employment

Financial forecasts

Capital requirements

Source of funds

Supporting documents / information

Position held (eg Chairman, Secretary)

Signature 1 _____

Signature 2 _____

Signed on behalf of (Organisation name)

Date

Data Protection

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 as 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 and data, which might 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 returning it to UCIT

Ulster Community Investment Trust Ltd (UCIT)
13-19 Linenhall Street, Belfast, BT2 8AA
t +44 28 9031 5003 f +44 28 9031 5008
e info@ucitltd.com

