

Section A – Personal Details

Membership No: _____ Employee No: _____

N.I. No: _____ Loan No: _____

Surname Mr/Mrs/Miss/Ms _____

First Name(s) _____

Date of Birth _____ Marital Status _____

No. of Dependents Living at home
under 16yrs. _____ over 16 yrs. _____

Present Address - _____

Post Code _____

Telephone No. _____

Previous Address (if at present address for less than 3 years).

Post Code _____

Are you a – Home Owner Private Tenant Shared Ownership

Is this your main house Yes No

Section B – Applicants Employment Details

Directorate _____ Section _____

Job Title _____ Nature of Employment _____

Full Time Part Time Date employed _____

Permanent - Yes No (Fixed term contract)

If fixed term contract - Start date _____
- Finish date _____

(We may contact personnel for confirmation of contract renewal).

Work address _____

Daytime contact no.

Work Tel. _____ Mobile No: _____

Section C – Loan Details

Amount of loan required _____

Duration of loan (years or months) _____

Maximum 3yrs. Under £500 must be paid within 1 year
(Please note that a new loan will be added to any outstanding balance and repayments will be based on paying back the full amount). **Please ensure that in order to receive the loan you present a proforma invoice with the specification of the goods or services and/or a receipt as proof of payment detailing the goods or services purchased**

Purpose of loan: I require this loan for the following Provident & Prospective purposes.

Section D Income and Expenditure Details

Take home pay: Weekly _____ Monthly _____

Spouse/Partners' pay: _____ Child benefit _____

Other income: (please specify) _____

Total monthly income: _____

Monthly Expenditure: (Cross through any that are not applicable)

Expense	Amount	Arrears (if any)
Mortgage		
Endowment Insurance		
Water		
Rent		
Council Tax		
Gas		
Electricity		
Telephone		
Food/clothes		
Credit Cards		
H.P / Catalogue		
Travel		
Other outstanding loan		
Other (state)		
Total Monthly Expenditure		

I declare that all information given in this application is accurate to the best of my knowledge.

Signed _____ Date _____

OFFICIAL USE ONLY

Name _____ Signature _____ Date _____
 Name _____ Signature _____ Date _____
 Name _____ Signature _____ Date _____

Loan granted/declined granted

Reduce loan of £ _____

More information required

Applicant to be interviewed

Guarantor required



Energy Loan Application Form

Notes for completion of loan application.

PLEASE READ FULLY before and after filling in form. If you need any help, please ring the office on 020 83148855. To be eligible for an energy loan you need to be a member of the credit union

Please complete all sections of the form and check your answers carefully. Please put as much detail in as possible – it really does make approving loans much easier. **Failure to complete the form may delay the processing of your application.**

Section A & Section B

Please **complete** both sections fully

Section C

Duration is either in months or years but not both. Under £500 has to be paid back within 1 year. Please state the reason for the loan fully. Please note energy loans are repaid via payroll deduction or standing order. Please ensure that in order to receive the loan you have included with the application: a proforma invoice with the specifications of the goods or services including the company's details and/or a receipt as proof of payment detailing the goods or services

Section D

THIS IS IMPORTANT. This is what we use to assess your ability to pay the loan. If you are only declaring your income, only include the expenses you pay. If you include your spouse/partner's income, declare all expenses paid by you both.

PLEASE NOTE: To be eligible for an Energy Loan you must belong to the Credit Union.

Declaration; I..... agree to participate as a member of the Credit Union.