

Income & Expenditure Details Please include all household income and expenditure, plus balances of other borrowings and savings. Please write value of any assets i.e. house, car, life policies and others in last column in yellow boxes only

Income Item	£ per month	Expenditure Item	£ per month	Outstanding Balance £	Value of Assets
Salary/ wages		Rent/ Mortgage			
Benefits		Council tax			
Pension		Electricity			
		Gas			
Other Income (please Specify)		Other loans			
		Groceries			
		Catalogues			
		Credit cards			
		Hire purchase			
		Car Loan			
		Telephone			
		Travel			
		Clothing			
		Pension			
		Savings/ investments			
		Home insurance			
		Car insurance			
		Life assurance			
		Other (please specify)			
TOTAL		TOTAL			

Members' Loan Application



Please fill in all the sections on pages 2, 3 & 4 and return form to this office together with any required supporting documentation

Please note it normally takes 7 days from receipt of application to arrange a loan

If you have any questions, or would like assistance in completing this form please ask

Registered office: 11a Frances St., Truro TR1

Member Details:

Name.....Member no.....

Address.....

.....Postcode.....

Time at current address..... (If less than 2 years, please
Provide details of other addresses in the past 2 years on a separate sheet)

Date of birth..... N I No.....

Home telephone no.....

Mobile no

Employment/Benefit Details (Please tick appropriate box)Employed ☐ Self employed ☐ Retired ☐ Unemployed ☐

Occupation (or type of benefit received).....

Name and address of employer.....

Work tel. no.Can you be contacted there? Y/N

Time with current employer.....
(If less than 1 year, please give details of previous employment on a separate
sheet)

Data Protection Statement: In accordance with the principles of the Data Protection Act 1998, we will use your personal details for the purposes of managing your account with the credit union. Your personal details will be treated confidentially and will only be shared with other agencies for the purposes of credit referencing and debt recovery, for which purposes we hold a Category F credit licence.

PURPOSE OF LOAN.....

Amount requested...£.....

Suggested repayment period..... years / months / weeks

Please tick if you would like **CASH** ☐ or **CHEQUE** ☐

If cheque, payable to:

Partner's Declaration

If you are declaring your partner's income & expenditure details as part of your overall figures (overleaf) your partner must sign below confirming agreement for this information to be used in considering the loan and its repayment.

Partner's name.....Partner's Signature.....

Formal DeclarationI declare that I am / am not* in good health.

I declare that the information I have given on this form is, to the best of my knowledge and belief, accurate and full information. I understand that the provision of false information is fraud and that the credit union may take appropriate action if I am found to have deliberately provided false or misleading information.

Applicant's signature..... Date.....

*If you are not in good health, details of your health status must be given on a separate sheet.

**PLEASE COMPLETE THE FORM OVERLEAF GIVING FULL DETAILS
OF INCOME AND EXPENDITURE.**

**PLEASE ALSO ATTACH EVIDENCE OF INCOME i.e Payslip, pension
or benefits statement.**

**IF SELF EMPLOYED attach copy of annual tax return, or 3 months
bank statements showing regular income.**