



THE BEATTIE FOUNDATION PRESENTS

The Bank of Mum and Dad

APPLICATION FOR INDIVIDUALS

Please feel free to contact the Foundation Director if you have any questions about your application, the application form or application process.

Please send your application form to:
alexandra@beattiefoundation.com

FOR OFFICE USE ONLY

Date Received:

Application No:

Name of Loan Seeking Individual:

Supported by a UK registered Charity

Yes No

PLEASE PROVIDE DETAILS ABOUT YOURSELF

1. Full Name: _____

2. Main Address: _____

3. Contact Details: _____

4. First Referee _____

Title: _____

Name: _____

Role: _____

Tel No Day: _____

Tel No Evening: _____

Mobile: _____

Fax Number: _____

Email: _____

Address: _____

5. Second Referee _____

Title: _____

Name: _____

Role: _____

Tel No Day: _____

Tel No Evening: _____

Mobile: _____

Fax Number: _____

Email: _____

Address: _____





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6. How long have you known the above referees and in what capacity?

7. Please use the space below to outline the challenges you face, and how this application relates to one of the themes important to Bank of Mum and Dad: Dignity, Freedom, Sanctuary.

8. How will support from us combat the challenges you are experiencing?

9. What are the results/achievements you hope for as a result of our support?

Credit supplied by the Bank of Mum and Dad must be sought and used for the purpose of goods and services. Credit is awarded on a Borrower, Lender, Supplier agreement basis. This means, the Bank of Mum and Dad will provide credit to a supplier of goods and services on your behalf. Although you will repay the credit to the Bank of Mum and Dad. Please confirm the supplier of the goods and services you would like us to arrange credit to.

Company

Representative Name (if applicable)

Contact details (if applicable)

Amount applied for

Purpose of loan

Successful

Yes No

Date

10. Please provide us with a breakdown of the expenditure attached to your application. You may attach a separate excel sheet detailing the budget to this form.

DECLARATION

I confirm that I am authorised to make this submission and sign this declaration. I understand and agree to the following conditions should any loan be made.

1. Credit is repayable by no more than 12 instalments (eg. Monthly) within no more than 12 months (schedule to be set by the Bank of Mum and Dad).
2. Loans must be sought and used to purchase goods or services. (Borrower-Lender-Supplier agreement).
3. Loans will always be awarded as a fixed amount.
4. Loans awarded will involve no charges or interest.
5. I certify that the information contained in this application is correct.
6. If the information in the application changes in any way, we will inform Bank of Mum and Dad immediately.
7. If successful I will not use the loan for any other purpose other than that specified on the award letter without first contacting Bank of Mum and Dad to seek authorisation.
8. If successful I will provide copies of documentation to prove my identity as requested by Bank of Mum and Dad, I have read the Data Protection Statement adhered to by Bank of Mum and Dad and understand why these documents are required and how they will be used.
9. I will endeavour to uphold and respect Bank of Mum and Dad's reputation and ethos.





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10. I will send a brief report to Bank of Mum and Dad, outlining progress made on the project and money spent, within 3 months of receiving the loan.
11. I will keep receipts and records of any payments made with this loan and will send copies of the receipts, along with an End of Loan Report to Bank of Mum and Dad, at the end of the project (within a maximum of 12 weeks following the end of the initiative).
12. I will highlight the support given by Bank of Mum and Dad in all relevant publicity material which I will share with Bank of Mum and Dad.
13. I agree for Bank of Mum and Dad to use details about any award received by me for promotional purposes.
14. Applicants will be required to provide bank statements for the last 3 months to prove insufficient funds available to meet their need.
15. Applicants will be required to provide two referees who are in a professional capacity, able to confirm the circumstance the loan applicant finds themselves in.

Please note the referees stated will be asked to sign the following statement: *"I have know the applicant for at least one year. I have read the application and support this request for funding. I am willing to be contacted to discuss this application and at a later date to comment on the loan, if this application is successful".*

MAIN PERSON CONTACT

(Person completing this application)

Signature: _____

Print Name: _____

Position: _____

Date: _____

SECOND PERSON CONTACT

(Trustee/Management Comm.)

Signature: _____

Print Name: _____

Position: _____

Date: _____

