

# Your Corporate Bank

## BUSINESS LOAN APPLICATION FORM (DRAFT)

Auto-Generated by OpportunityNavigator AI

Application Date (Auto-Generated): 2025-05-18

Prepared For: GreenLeaf Organics Ltd.

Instructions: This application form has been partially pre-filled using information gathered by the OpportunityNavigator AI system from internal and external data sources. Please review all information carefully. Fields marked with emphasis need specific input or confirmation from the client. This document is a draft and requires client verification and signature before formal submission.

### SECTION 1: APPLICANT DETAILS

Field	Value	Source Indication (Internal Note)
Registered Company Name:	GreenLeaf Organics Ltd.	Companies House #09876543
Company Registration No.:	09876543	Companies House
Date of Incorporation:	Approx. 8 years ago	Companies House/Internal
Trading Address:	Unit 5, Willowbrook Industrial Estate, Reading, RG2 0TD	Internal CRM
Primary Contact Person:	Jane Doe	Internal CRM
Position:	CEO	Internal CRM
Contact Email:	j.doe@greenleaforganics.co.uk	Internal CRM
Contact Phone:	0118 9XXXXXX	Internal CRM (SalesForce)
Years in Business:	Approx. 8 years (Client with bank for 7 years)	Internal Client Module
Industry / Sector:	Organic Food & Beverage Production	External Research/Website
Number of Employees:	Est. 20-50 (To be confirmed)	External Research (e.g., LinkedIn)
Website:	www.greenleaforganics.co.uk (Assumed)	External Research

### SECTION 2: LOAN REQUIREMENTS

Field	Value	Source Indication (Internal Note)
Loan Amount Requested:	[ATTENTION REQUIRED - RD TO DISCUSS WITH CLIENT]	Client Input Needed
Purpose of Loan:	Investment in a new bottling and packaging line to meet escalating demand and to expand distribution network.	External (Annual Report Analysis) / CRM
Proposed Loan Term:	[ATTENTION REQUIRED - RD TO DISCUSS WITH CLIENT]	Client Input Needed
Proposed Repayment Source:	Increased revenue and profits from expanded production capacity and market reach.	Analysis Agent Synthesis
Specific Assets to be Financed:	New bottling and packaging line	Inferred from Purpose

### SECTION 3: BUSINESS FINANCIAL INFORMATION (Most Recent Full Year - FYE 2023)

Field	Value	Source Indication (Internal Note)
Annual Turnover (FYE 2023):	GBP 3,500,000	Companies House

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Gross Profit (FYE 2023):	See Filed Accounts	Companies House
Net Profit (FYE 2023):	GBP 450,000	Companies House
Net Assets (FYE 2023):	GBP 1,200,000 (Example)	Companies House
Avg Bank Balance (Last 12m - Primary Current A/C with us):	GBP 150,000	Internal Core Banking
Existing Bank Loans/Facilities (with us):	Equipment Loan (Facility ID: EL4567)	Internal Lending System
Original Amount:	GBP 50,000	Internal Lending System
Current Balance (approx.):	GBP 10,400	Internal Lending System
Remaining Term:	12 months	Internal Lending System
Repayment Record:	Perfect	Internal Lending System
Other Significant External Borrowings:	Debenture with FinSecure Lenders PLC, maturing November 2025.	Companies House (Charges Register)
Amount Outstanding:	[TO BE CONFIRMED BY CLIENT]	Client Input Needed

### SECTION 4: MANAGEMENT & OWNERSHIP

Field	Value	Source Indication (Internal Note)
Key Directors / Owners:	Jane Doe (CEO)	CRM / Companies House
	John Smith (Director - Example)	Companies House
Brief Management Experience:	Jane Doe: Experienced leader in food sector (To be expanded)	External Research / CRM
Shareholding Structure (Major):	Primarily held by Jane Doe (To be confirmed)	Companies House / Client Input

### SECTION 5: SUPPORTING INFORMATION & MARKET OUTLOOK (SUMMARY)

- \* Recent Business Performance Summary: Turnover up 40% YoY, Net Profit up 25% YoY (FYE 2023). Average bank balances with us increased 35% in the last 12 months.  
(Source: Aggregation from Companies House & Internal Banking System)
- \* Market Outlook Summary: Organic Food & Beverage Market UK projected 8-10% CAGR (next 3 years). GreenLeaf Organics highlighted as a "rising star" in industry publications.  
(Source: MarketScan Ltd Report Q1 2024 & Food Business News Article Scan)
- \* Proposed Security (Initial Indication): To be discussed. Potential for charge over new assets financed and review of existing security structure.  
(Source: Bank Policy Agent - Standard Security Requirements)

### SECTION 6: SUPPORTING DOCUMENTS CHECKLIST

Please attach the following documents. Items marked [X] have been identified/sourced by OpportunityNavigator AI.

Document	Client to Attach/Confirm	AI Found/Identified
Last 3 Years Audited/Filed Financial Accounts	[ ]	[X]
Management Accounts (Year-to-Date)	[ ]	[ ]

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Business Plan for Expansion Project	<input type="checkbox"/>	<input type="checkbox"/>
Financial Projections (3-5 years)	<input type="checkbox"/>	<input type="checkbox"/>
Aged Debtors & Creditors List	<input type="checkbox"/>	<input type="checkbox"/>
Bank Statements (Last 6 months, non-our bank)	<input type="checkbox"/>	<input type="checkbox"/>
Director(s) CVs / Profiles (Jane Doe)	<input type="checkbox"/>	<input checked="" type="checkbox"/> (Partial)
Proof of ID & Address for Directors	<input type="checkbox"/>	<input type="checkbox"/>

### SECTION 7: DECLARATIONS

I/We declare that the information provided in this application and any attached documents is true, complete, and accurate to the best of my/our knowledge. I/We authorize Your Corporate Bank to make any necessary inquiries to verify this information, including credit checks on the company and its directors/guarantors. I/We understand that providing false or misleading information may lead to the rejection of this application or termination of any facility granted.

I/We acknowledge that this auto-generated draft requires our full review and confirmation of all details, particularly those marked for attention.

### SECTION 8: SIGNATURES

For and on behalf of GreenLeaf Organics Ltd.:

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Signature

Name: Jane Doe

Position: CEO

Date: \_\_\_\_\_

#### For Bank Use Only:

Application Received By: \_\_\_\_\_ Date: \_\_\_\_\_

Initial Assessment Notes: