

# 6.0 Information templates and checklists

Eligibility checklists and information gathering templates are provided below for each finance type

## 6.1 Commercial loan or Environmental Upgrade Agreement

### Eligibility checklists

	Checklist
<b>COMMERCIAL LOAN</b>	You require at least \$10,000 of finance (although most financiers require a minimum project size of \$250,000) <input type="radio"/>
<b>ENVIRONMENTAL UPGRADE AGREEMENT</b>	You will use the money for works that improve the energy, water or environmental efficiency or sustainability of a building <sup>1</sup> <input type="radio"/>
	You own the building where the proposed works will be implemented, or are working with the building owner to obtain an Environmental Upgrade Agreement <input type="radio"/>
	The building you plan to upgrade is located in one of the following council areas: City of Sydney, North Sydney Council, Parramatta City Council, The City of Newcastle, Lake Macquarie City Council <input type="radio"/>
	The building is an existing non-residential building <input type="radio"/>
	The building owner and existing building do not have outstanding rates payable or outstanding orders <input type="radio"/>
	If the building is in the Parramatta City Council area: • The works were identified and documented by a suitable qualified professional • The works comply with all Council property development requirements <input type="radio"/>

### Information gathering template

The same information gathering template can be used for commercial loans and Environmental Upgrade Agreements.

<b>CUSTOMER DETAILS</b>	Company name
	Address
	Company website
	ABN/ACN
	Contact name, number and email address
	Industry
	Current financier

<sup>1</sup> If you are unsure whether the works are eligible for an Environmental Upgrade Agreement, refer to Section 3.3 of the Guidelines for Environmental Upgrade Agreements at [www.nsw.gov.au/sites/default/files/No\\_16\\_of\\_2011.pdf](http://www.nsw.gov.au/sites/default/files/No_16_of_2011.pdf)