

Introducer Details

Contact name	<input type="text"/>	Telephone	<input type="text"/>
Company name	<input type="text"/>	Fax	<input type="text"/>
Email	<input type="text"/>	Mobile	<input type="text"/>
Can we contact your client direct?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Is the commercial mortgage required either	<input type="checkbox"/> A new purchase	<input type="checkbox"/> A remortgage	<input type="checkbox"/> Second charge

Client Details

If there are 3 or more please provide their details separately

Applicant/Director/Partner 1

Title & full name

Address & postcode

Date of birth

Telephone

Mobile

Fax

Email

Will the borrowing be in the name of Individual(s) Partnership

If for a company (or other entity) what is its name?

Applicant/Director/Partner 2

Title & full name

Address & postcode

Date of birth

Telephone

Mobile

Fax

Email

Limited company Other (describe)

If the applicant has existing buy-to-let or investment property please state how many

Property Details

How close is your client to purchasing the property?

Contracts exchanged An offer has been made An offer has been accepted

Property has been viewed Due to bid at auction Property not yet found

For remortgages only

Date of purchase

Purchase price

Current value

Mortgage outstanding

Mortgage lender

Arrears in last 12 months

Is the property Freehold Feudal Leasehold

If leasehold, what is the outstanding term of the lease? years

What is the purchase price?

Is this for bricks and mortar only? Yes No

If no, please provide details of the goodwill/stock element years

What is the estimated open market value?

What is the estimated 90 day value?

* if known — for niche lenders only

How much does your client plan to borrow?

How much does your client have as a deposit?

What is the source of the deposit? Savings Sale of property Remortgage of property Other (describe)

What is the preferred term of the mortgage? years What is the preferred interest rate option? Variable Fixed

Is your client looking for specific mortgage features? Early/partial repayment Interest only term Interest offset option Other (describe)

What is the full address of the security property? Please provide a brief description of the property

Has a recent valuation been carried out? Yes No
* if yes, please provide a copy of the report

What business sector is the property's current use? And you client's proposed change of use (if any)

Will the property be let? Yes No How many commercial tenants will there be?

What is the best description of the largest tenant? Blue chip National chain Residential tenant Government Small company Client's own company Local government Sole trader Property is empty

In addition to commercial tenants will there be any residential tenants? Yes No What is the term left on all rental agreements?
What is the expected total annual rental income? £

Will your client or family live in the property? Yes No If yes, will they occupy more than 40% of the total security area? Yes No

Will part of the property be let to a third party? Yes No If yes, what is the expected annual rental income? £

Has your client approached their own bank or other lender about this mortgage? Yes No If yes, and terms have been offered, please provide details (Lender, rate, term, lender fee, other)

Is your client prepared to transfer their business banking to the lending banks? Yes No If yes, is it necessary that they have a branch of this bank near to them? Yes No

Can your client provide trading accounts? Yes No If yes, how many years can be provided? years

What type of accounts can be provided? Audited Certified Management Prepared by an accountant

If known, please provide the last three years' financial history

Year 1	20 <input type="text"/>	/	20 <input type="text"/>	Turnover	£ <input type="text"/>	Net profit	£ <input type="text"/>
Year 1	20 <input type="text"/>	/	20 <input type="text"/>	Turnover	£ <input type="text"/>	Net profit	£ <input type="text"/>
Year 1	20 <input type="text"/>	/	20 <input type="text"/>	Turnover	£ <input type="text"/>	Net profit	£ <input type="text"/>

If your client cannot provide trading accounts, please indicate how they will evidence their income Self-cert only Self-cert & accountant's letter Self-cert & projections Employed income Rental income

Has the applicant missed any credit payments, got any adverse credit history, county court judgements or been declared bankrupt?

Yes No

If yes, please provide details

Can your client provide the following information?

6 months business bank statements*

3 months personal bank statements for each director/partner*

Asset and liability statement for each director/partner*

Proof of deposit*

Valuation

* Most prime lenders will ask for these. To avoid processing delays, and ensure we get the best terms possible, please make your clients aware of these requirements.

Other finance requirements. Please indicate if you/your client would like information on the following

Switching business banking

Invoice finance

Asset finance

Unsecured card transaction factoring

Capital allowances

Other (describe)

Do you hold any other assets of value? e.g. luxury car, fine art, jewellery

Yes No

If yes, please provide details

Additional Info

Please provide any further details that you feel are relevant. In cases where capital is being raised, please indicate what the funds will be used for.