

Please complete all sections and email to
enquiries@businessfinancial.co.uk

Introducer details

Contact name

Company name

Telephone number

Mobile number

Fax number

Email

Can we contact your client direct?

Yes

No

Is the commercial mortgage required either

A new purchase

A remortgage

Client details | Applicant/director/partner 1**Applicant/director/partner 2***If there are 3 or more
please provide their
details separately*

Title & full name

Title & full name

Address & postcode

Address & postcode

Date of birth

Date of birth

Telephone number

Telephone number

Mobile number

Mobile number

Fax number

Fax number

Email

Email

Will the borrowing be in the name of?

Individual(s)

Partnership

Limited
company

Other _____

If for a company (or other entity) what is it's name?**If the applicant has existing buy-to-let or investment property please state how many:**

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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

Important
If the outstanding lease term is less than 25 years contact us immediately - specialist terms may apply

What is the purchase price? £ **Is this for bricks and mortar only?** Yes No

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

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 _____

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 _____

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 your client's proposed change of use (if any)** 2/4

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 Government Local government
 National chain Small company Sole trader Residential tenant Client's own company 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 bank? 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?

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: 201___ / ___ Turnover: £ _____ Net profit: £ _____

Year 2: 201___ / ___ Turnover: £ _____ Net profit: £ _____

Year 3: 201___ / ___ Turnover: £ _____ Net profit: £ _____

If your client cannot provide trading accounts, please indicate how they will evidence their income:

Self-certification 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 full details (continue overleaf if necessary):

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 client 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

Payroll funding

Other _____

Additional information: Please provide any further details that you feel are relevant.

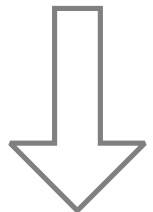
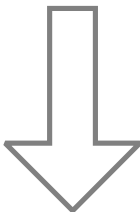
In cases where capital is being raised, please indicate what the funds will be used for.

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www.businessfinancial.co.uk

Email to: enquiries@businessfinancial.co.uk

Thank you



Client Authorities

Applicant 1: _____

Address: _____

Applicant2: _____

Address: _____

Important must be signed by all Clients

I / We authorise you to make such enquiries and obtain such confirmations and references as you may deem appropriate for any Person or Company, including Accountant, Credit Bureau, Mortgage or Lending Companies and Solicitors now or at any time in the future with reference to my / our mortgage / loan application and that this information may be received by email or fax.

Signed: _____

Name: _____

Date: _____

Signed: _____

Name: _____

Date: _____