

Please complete the information on the following pages as fully and accurately as possible. The information you advise here will be used to submit your application to the lender. Please return the form to your Business Manager.

Company details									
Company Name				Trading as					
Entity type	Sole Trader			Partnership		Limited Company			
Contact				Company Number					
Position/capacity				Trading since					
Company phone				Nature of business					
Company email				Business Year end month					
Company fax				Number of employees					
Company address				Previous address (if less than 3 years at present Address)					
Postcode				Postcode					
Time at this address		Years		Months	Time at this address		Years		Months
Registered Address				Any additional information					
Postcode									

Servicability				
20	Turnover £		Net profit means the taxable income made after deducting expenses	Net profit £
20	Turnover £			Net profit £
20	Turnover £			Net profit £

Business Bank Details				
Bank Name			Account Name	
Branch			Account Number	
Sort Code				

Accountant Details	
Company name	
Company address	
Company phone	
Contact name	

Director/Partner details							
Director/Partner 1				Director/Partner 2			
Shareholding %				Shareholding %			
Responsibilities				Responsibilities			
First name				First name			
Middle name(s)				Middle name(s)			
Last name				Last name			
Date of Birth				Date of Birth			
Nationality				Nationality			
If not British, do you have permanent rights in the UK	Yes		No	If not British, do you have permanent rights in the UK	Yes		No
	If no, confirm visa expiry date				If no, confirm visa expiry date		
National Insurance Number				National Insurance Number			
Marital Status				Marital Status			
Dependants				Dependants			
Home Phone				Home Phone			
Mobile				Mobile			
Email				Email			

Address		Address	
Postcode		Postcode	
Time at this address	Years	Months	
Residential status	Owner	Tenant	Other
Previous address (if less than 3 years at present address)		Previous address (if less than 3 years at present address)	
Postcode		Postcode	
Time at this address	Years	Months	
Residential status	Owner	Tenant	Other

Statement of Personal Details. Please complete our Assets Liabilities Income & Expenditure form

For limited companies. Please confirm your current taxable PAYE income, if applicable

Director/Partner 1	Director/Partner 2
£	£

For limited companies. Please confirm your dividend income drawn for each year, if applicable

Director/Partner 1	Director/Partner 2
20	£
20	£
20	£

Employment details

Director/Partner 1	Director/Partner 2
Job Title	Job Title
Occupation	Occupation
Salary	Salary
Bonus	Bonus
Overtime	Overtime
Date started	Date started
Contract type	Contract type
Name of Employer	Name of Employer
Address of Employer	Address of Employer
Postcode	Postcode
Employer Phone	Employer Phone
Contact Name	Contact Name

Director/Partner 1 Personal Bank Details

Bank Name	Account Name
Branch	Account Number
Sort Code	

Director/Partner 2 Personal Bank Details

Bank Name	Account Name
Branch	Account Number
Sort Code	

Mortgage details

Lender	Lender				
Purchase Price	£	Purchased	Purchase Price	£	Purchased
Balance outstanding	£	Term	Balance outstanding	£	Term
Monthly Payment	£	Monthly Payment	£		
Current property value	£	Current property value	£		

Solicitor Details

Company name	
Company address	
Company phone	
Contact name	

Funding Required			
Purpose of Loan			
Property Portfolio. Please include details for the property/properties that you are looking to finance on our Property Schedule form			
Property Address			
Valuation		Amount required	
Term		Repayment method	
Freehold/Leasehold		If Leasehold, unexpired term	
Proposed Completion Date		Any additional information	

Adverse Credit			
Any adverse credit in the past 6 years	Yes*		No
*Please detail			

Data Protection Consent

By submission of this proposal by you, you confirm that you have told the person(s) named on this form of all the purposes for which we will use the data that has been supplied to us. You have told them that we will propose this request for finance to you, and that a search will be registered with one or more credit reference agencies, who will add to this person's record details of the search and this will be seen by other organisations that make searches. If this proposal for finance is sent to any other organisation, there is a possibility of a further search being recorded with credit reference agencies and that they may receive marketing information from any such organisation.

Background to the business
Premises
Business Accounts
Bank Account
Management
Brief summary of proposal
Rationale
Any additional information

Introduction source	
Company name	
Company address	
Contact name	
Mobile	
Email	