

Let's see if we can lend...

Details requested are essential to provide us with a thorough overview of the proposal and ALL questions must be answered to prevent a delay in processing.

1. BROKER DETAILS & FCA PERMISSIONS			
All introducers involved in the transaction must be listed			
Shawbrook broker partner name: Complete FS		Broker fee amount (if applicable) £	
Name of firm: Complete FS		Contact name:	
Telephone: 02380 456999		Email: commercial@complete-fs.co.uk	
FCA Permissions: Please confirm you provided the advice		Yes	No
		FCA number:	
Other introducer details:			
Name of firm:		Contact name:	
Telephone:		Email:	
FCA Permissions: Please confirm you provided the advice		Yes	No
		FCA number:	

2. APPLICANT SOURCE:		
Please confirm where the lead was generated from		
Introducer from own panel	Direct applicant recommended by existing customer	Direct applicant from own marketing campaign
Shawbrook referred introducer	Introducer from a network/affinity group	Direct applicant referred by Shawbrook:

3. EXISTING SHAWBROOK CUSTOMERS			
Please confirm if the customer has another product with Shawbrook			
Asset Finance	Business Credit	Commercial Mortgage	Account number(s): _____
Secured Loan	Savings account	Consumer Loan	Loans up to £750,000: Discount is to apply to: Margin Arrangement fee

4. LOAN DETAILS						
Application type:	Individual/Partnership	LLP	UK Limited Company			
Loan amount:	£				Term (years)	
LTV requested:	%				Estimated completion date:	
Fixed rate?	Yes	No	If yes, number of years fixed:	3	4	5
Product:	RIO	RI1	RI2	RI3	RR1	RR2
Repayment:	Interest only		Part capital repayment		Full capital repayment	
RR products only:	Estimated after works value: £		Estimated after works rental: £		PA	

Please tick to confirm that this AIP is submitted on your understanding that the borrower has sufficient experience to meet our requirements

Yes

5. MORTGAGE PURPOSE			
REMORTGAGE:			
Estimated property value:	£	Date purchased:	Amount of outstanding finance: £
Is there any element of debt forgiveness from the existing lender? Yes No			
Where more funds are being borrowed than are currently owed on the property, what will the proceeds be used for?			

Debt consolidation Property improvements Purchase another property

Other (please detail):

PURCHASE:

Purchase price: £

Deposit source:

6. APPLICANT INFORMATION

Limited company name:	Company number:	UK incorporated?	Yes	No
Limited Company trading address:	Limited Company net worth: £			
Information	Borrower/Guarantor 1		Borrower /Guarantor 2	
Title:				
Surname:				
Forename (include any middle names):				
Date of birth:				
Permanent residential address/correspondence address for company:				
Time at this address:	years	months	years	months
Previous address if this is less than 3 years:				
Preferred contact number:				
Personal net worth:	£		£	
The applicant's personal income is sufficient to support their personal expenditure:	Yes	No	Yes	No

7. SECURITY INFORMATION

How many properties are being offered as security?	Where portfolios are offered please complete a Property Portfolio sheet.				
Property address:					
Property Description:	House	Flat	Maisonette	HMO	Student let
If the property is a flat:	Units in block?		Storeys in block:	Larger than 30m ²	Yes No
Is the property above a commercial property?	Yes	No	Is the property ex-local authority owned?	Yes	No
Is the property in a finished condition, ready to let?	Yes	No			
If no, please confirm works:					
Has the property been refurbished/converted within the last 12 months?	Yes	No			
If yes, cost of works completed: £					
Number of tenants:	Current passing rental income at security from residential letting income:				£
Please confirm that you have checked the DSCR fits on the online calculator: Yes					

8. ADDITIONAL SECURITY INFORMATION (For portfolio applications please complete a Property Portfolio sheet)

Property address:					
Purchase price/estimated value: £			Outstanding finance on property: £		
Property Description:	House	Flat	Maisonette	HMO	Student let
Type of security:	1 st charge	2 nd charge	Where HMO, confirm number of beds:		

9. DEAL SUMMARY / KEY ADDITIONAL INFORMATION

Please provide any additional information you think is important to help us reach AIP, such as if this case appears outside any of our published criteria. By detailing any mitigating factors it will ensure we give the application the right consideration.

10. DATA PROTECTION CHECKLIST

Must be fully completed before we can complete any searches.

Please complete all items on this checklist. If you are unable to confirm all of the points below, the applicant must complete and sign a credit search consent form.

I have read the latest Script for Obtaining Consent to the applicant(s) (as found on the Shawbrook Broker Hub), which includes details about credit reference agency and other searches, and they have confirmed their acceptance to proceed.					
Date and time consent obtained from applicant(s)			If by telephone, was this recorded?		Yes No
Print Broker name:			Date:		

