

ENQUIRY REFERRAL CASE SUMMARY

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Borrower			
Channel Originator			
Account No		Case Ref	
Lead ref number		Completion date	
Clients solicitors			
Legal instruction type			
Regulated / Non-regulated	☐ Regulated ☐ Non-Regulated		
Broker / Introducer name			
On boarding submitted	(dd/mm/yyyy)	On boarded by	
Commission agreed (%)		Customer nationality	
CRM Checks for rejected / cancelled cases			
Existing account number(s) & Corp code			
Product type			
Interest	☐ Serviced ☐ Retained		Term
Charge Type			
Please confirm any outstanding borrowing on the security with lender and balance along with the charge currently held on this case summary			
Purpose of the loan			
Please confirm what they are doing with the funds e.g. business funds (please give explanation of business), other property investments etc			
Rates %	AF	MI	Exit Fee

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Gross loan amount		Net loan amount	
LTV		Broker fee	
Security Address / Title Number			
What is the security used for? Is it let out ? Borrowers own home ? Vacant ?			
Purchase price		EPC	
Valuation MV		Valuation 90D	
Please confirm how much the property was bought for and when if already owned			
Property type / description How many beds, bathrooms reception rooms ?			
Affordability summary			
Exit strategy			
Generic documents		Property photos	☐ Yes ☐ No
App form	☐ On File ☐ Awaiting	Ltd. Co. structure	☐ On File ☐ Awaiting
Buildings insurance	☐ On File ☐ Awaiting	Proof Income/Accounts ref	☐ On File ☐ Awaiting

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Further Information

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Upload images (jpg, png, and gif)

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