

Commercial mortgage initial enquiry form

To be completed by the introducer/customer: Please complete in as much detail as possible

Business Details

Name of business _____
Is the applicant a limited company, partnership or sole trader (delete as appropriate) _____
Nature of business (main activity) _____
Contact name _____
Job title (designation) _____
Address of business _____
Town _____ Post Code _____
Business telephone number _____ Fax number _____
E-mail _____

Does the applicant or a related person (spouse, common law partner, sibling, child, grandchild, grandparent) dwell or intend to dwell at part of the property being offered as security Yes No
If so, does this part exceed 40% of the total security area? Yes No

Commercial mortgage details

Purpose of loan Purchase Remortgage
Amount required £ Term required yrs
Advance requested Capital & Interest
Interest only

Property to be mortgaged

Address of property to be mortgaged _____
(description and intended use) _____
Is the property Owner occupied Part owner occupied % let _____
Tenure of property Freehold Leasehold
number of years unexpired yrs
Where property owned Date purchased _____ Purchase price _____ Current estimated value _____
Existing mortgage plus balance outstanding if applicable

Financial/Credit status (Documentation not required at this stage)

Are the last 3 years accounts available Yes No
Are the last 3 months bank statements available Yes No
Is the O/D facility letter available Yes No
Are the lease/tenancy agreements available Yes No
Any existing CCJ's Yes No
Have any Directors/Partners or Sole Traders been made Bankrupt an undischarged bankrupt
Has any party had any arrears on any business/personal loans in the past 3 years Yes No
If yes, please give details _____

Intermediary details

Company name _____ Contact name _____
Address _____
Telephone number _____ Fax number _____
E-mail address _____



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