



Commercial Loan Enquiry Form

Email: enquiries@commercialexpert.co.uk
 Tel: 01325 359800

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
Contact			Limited Company
Position/capacity			Company Number
Company phone			Trading since
Company email			Nature of business
Company fax			Business Year end month
Company address			Number of employees
			Previous address (if less than 3 years at present Address)
Postcode			Postcode
Time at this address	Years	Months	Time at this address
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	Time at this address		Years		Months		
Residential status	Owner		Tenant		Other	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	Time at this address		Years		Months		
Residential status	Owner		Tenant		Other	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	£	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			
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 receiving 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	