

INTERMEDIARY DETAILS

Broker name:	<input type="text"/>	Company name:	<input type="text"/>
Broker telephone:	<input type="text"/>	FCA number:	<input type="text"/>
Email:	<input type="text"/>		
Your permissions:	Independent <input type="checkbox"/>	Firsts only <input type="checkbox"/>	Credit Broker <input type="checkbox"/>
Regulatory status:	Directly Authorised <input type="checkbox"/>	Appointed Rep <input type="checkbox"/>	Commercial Broker <input type="checkbox"/>

IF YOU ARE AN APPOINTED REPRESENTATIVE, PLEASE PROVIDE NETWORK DETAILS

Network name:	<input type="text"/>
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LOAN DETAILS

Loan type:	Purchase <input type="checkbox"/>	Remortgage <input type="checkbox"/>
Loan purpose:	<input type="text"/>	
Date funds required:	<input type="text"/>	
Application type:	Personal <input type="checkbox"/>	Limited company <input type="checkbox"/>
Application FCA regulated?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Firm giving advice:	<input type="text"/> (if applicable)	
Client preferences:	Lowest overall cost <input type="checkbox"/> Lowest set-up fees <input type="checkbox"/> Lowest interest rate <input type="checkbox"/> Lowest upfront fees <input type="checkbox"/> Lowest admin requirements <input type="checkbox"/> Case fully underwritten before fees are incurred <input type="checkbox"/> Joint legals <input type="checkbox"/>	
Fees being added to loan?	Telegraphic transfer <input type="checkbox"/>	Facility fee <input type="checkbox"/> Assessment fee <input type="checkbox"/>
Are you charging the applicant(s) a broker fee?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
If yes, how much?	£ <input type="text"/>	
If yes, when is it payable?	Upfront <input type="checkbox"/>	At offer <input type="checkbox"/> On completion <input type="checkbox"/>
Security type:	First charge <input type="checkbox"/>	Second charge <input type="checkbox"/>
If second charge, what is the first charge balance?	£ <input type="text"/>	
Have the Applicant(s) or immediate family lived/intend to live in the security property?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Estimated property value:	£ <input type="text"/>	Property purchase price: £ <input type="text"/>
If purchase price is less than property value, please explain:	<input type="text"/>	

LOAN DETAILS CONTINUED

Required loan amount: £ Required term: months

Additional security offered? Yes No

If yes, value of security: £ Debt of security: £

EXIT STRATEGY

Please tick all applicable:

Sale Refinance Endowment maturity Pension maturity Savings maturity Other

Please give details of how the loan will be repaid, including the lender name if refinancing:

LIMITED COMPANY DETAILS

Company name:

Registration number: Number of directors:

Business start date: Country of incorporation:

APPLICANT DETAILS

Applicant 1 / Director 1:

Applicant 2 / Director 2:

Title:

First name(s):

Surname:

Date of birth:

Home telephone:

Mobile telephone:

Email:

Marital status:

Nationality:

Country of residence:

Annual income: £

Employed/self-employed:

Current address (If less than 3 years at their current address, please provide details of previous addresses in the notes section)

Date moved in: DD / MM / YY

Residential status:

Estimated property value: £

Loan outstanding: £

Has/have the applicant(s) had any adverse credit registered in the last 3 years? Yes No

If yes, details:

SECURITY DETAILS

Security property address/postcode:

Property type:

Property's current use:

Number of floors (flats only):

Floor number (flats only):

Number of bedrooms:

Property tenure:

Freehold

Leasehold

If applicable, remaining lease term:

NOTES

Please provide any additional information to support this application:

APPLICATION ROUTE

PLEASE SELECT THE ROUTE TO PROCEED WITH THIS ENQUIRY

ROUTE 1:

CASCADE TO THE BEST AVAILABLE PRODUCT AND REPORT ON THAT ONLY

In some cases we may need to approach more than one lender in order to secure your (your client's) loan. We always start with the lender that most closely matches your preferences and will give you the best deal possible. However, if that lender is not able to accommodate your circumstances, we will move to the next lender in line. This may mean that we need to share your (your client's) personal data with more than one lender. We will keep records of whomever we share information with so that we can request deletion where necessary.

Is your client happy for us to proceed on this basis? If so please select this route:

ROUTE 2:

REVIEW PRODUCTS LENDER BY LENDER, REPORT ONE AT A TIME

If you would prefer we can report back lender by lender until we have a lender that believes they can assist your client. We are very happy to take this approach but please note it will elongate the process.

If you prefer us to report lender by lender, please select this route:

ROUTE 3:

HIGH-LEVEL INDICATIVE TERMS ON LIKELY OPTIONS AVAILABLE

Would you like us to provide a quick overview of high-level indicative terms, without full client data being sent to any lender.

If you prefer us to provide indicative terms, please select this route:

Please be assured that we will not do any hard footprint credit searches that other institutions can view without express consent.

Please telephone our Data Controller on 01202 850 835 if you want to understand how your data will be used. You have a legal right to receive a copy of the information we hold about you.

Declaration and authorisation

In assessing the application, we will make enquiries about your client(s) including searching any records held by Credit Reference Agencies, Electronic Identity/Verification Systems and checking details with Fraud Prevention Agencies. If false or inaccurate information is provided and we suspect fraud we will record this. The Credit Reference and Fraud Prevention Agencies will keep details of any searches. Information held by the Credit Reference Agencies may already be linked to records relating to one or more of the financial associates.

For the purpose of this application your client(s) may be treated as financially linked and the application will be assessed with reference to any "associated" records. If it is a joint application or if you have told us of some other financial association with another person, you must be sure that you are entitled to (a) disclose information about any joint applicant and anyone referred to; and (b) authorise us to search, link or record information at Credit Reference Agencies. An association between joint applicants and between anyone you tell us is a financial partner will be created at Credit Reference Agencies. This will link financial records, each of which will be taken into account in all future applications. This will continue until a disassociation is successfully filed at the Credit Reference Agencies.

You confirm that your client(s) has/have given consent to us disclosing details of their application to Credit Reference Agencies, Fraud Prevention Agencies and our panel lenders. This information may be used to help us and other organisations to (a) assess the financial risk of dealing with them and other associates; (b) may be used to help make decisions on motor, household, credit, life and other insurance proposals and insurance claims; (c) administer agreements and insurance policies with them; (d) help prevent or detect fraud, prevent money laundering or other crimes, recover debts and trace debtors; and (e) for statistical analysis about credit, insurance and fraud.

The lender(s) we recommend may use "credit scoring" or other automated process in deciding whether to accept your client's application and during the life of their loan account. Lenders may use an initial soft search at the early stages of an enquiry, a full search on application and may recheck prior to or at completion.

IMPORTANT CONSENT INFORMATION

Please read this before you sign. Our full privacy statement can be viewed on our website.

By completing this agreement and returning by email, or by printing, completing, signing and returning by post, you consent to us using and disclosing details as described above. References to "we" and "us" include any subsidiary or other company associated or affiliated with Positive Lending (UK) Ltd.

At certain stages of the process we will be contacting the client, please tick all of the ways in which they are happy for us to contact them:

email telephone (including voicemail) SMS/Text messaging

You/they agree that telephone conversations and other communications between us or third parties may be recorded and/or monitored to assist in improving customer and collections services.

The consent given to use personal information we will assume expires on the completion of the loan or cancellation of this application if sooner.

Please sign to confirm you have read, understand and agree to the terms above and you are providing permission for credit searches to be undertaken. If you are signing on behalf of your client, you confirm that you have their consent as above:

Intermediary signature:

Date:

THINK CAREFULLY BEFORE SECURING OTHER DEBTS AGAINST YOUR HOME. YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE.

Positive Lending, Positive House, GP Centre, Yeoman Road, Ringwood, Hampshire BH24 3FF | 01202 850 830

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