

W P Property Finance  
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## BRIDGING LOANS ENQUIRY



### Section 1. Personal & contact details

#### Applicant 1

Title	<input type="text"/>
Full name	<input type="text"/>
Current residence address & postcode	<input type="text"/>
Date moved in	<input type="text"/>
Date of birth	<input type="text"/> Sex <input type="text"/>
Telephone No.	<input type="text"/>
Email address	<input type="text"/>
Relationship to second applicant	<input type="text"/>
Marital status	<input type="text"/>
Nationality	<input type="text"/>
UK resident	<input type="text"/>
Length of UK residency - Years	<input type="text"/> Months <input type="text"/>
Are you on the electoral role?	<input type="text"/>

#### Applicant 2

Title	<input type="text"/>
Full name	<input type="text"/>
Current residence address & postcode	<input type="text"/>
Date moved in	<input type="text"/>
Date of birth	<input type="text"/> Sex <input type="text"/>
Telephone No.	<input type="text"/>
Email address	<input type="text"/>
Relationship to first applicant	<input type="text"/>
Marital status	<input type="text"/>
Nationality	<input type="text"/>
UK resident	<input type="text"/>
Length of UK residency - Years	<input type="text"/> Months <input type="text"/>
Are you on the electoral role?	<input type="text"/>

### Section 2. Financials

Total monthly income – all sources	<input type="text"/>
Total monthly expenditure – all sources	<input type="text"/>
Total net monthly income after tax	<input type="text"/>
Total value of all assets in your name	<input type="text"/>
Total value of all liabilities in your name	<input type="text"/>
Total net individual worth	<input type="text"/>

Total monthly income – all sources	<input type="text"/>
Total monthly expenditure – all sources	<input type="text"/>
Total net monthly income after tax	<input type="text"/>
Total value of all assets in your name	<input type="text"/>
Total value of all liabilities in your name	<input type="text"/>
Total net individual worth	<input type="text"/>

### Section 3. Employment

Employment status	<input type="text"/>
Full time	<input type="checkbox"/> Part time <input type="checkbox"/>
Occupation (job title)	<input type="text"/>
Employer/business name	<input type="text"/>
Business type/industry	<input type="text"/>
Date employment commenced	<input type="text"/>
Are you a shareholder – if yes, percentage held	<input type="text"/>
Company registration no. (if applicable)	<input type="text"/>
National ins. no.	<input type="text"/> Planned retirement age <input type="text"/>
If you have any additional employment please provide details below	

Employment status	<input type="text"/>
Full time	<input type="checkbox"/> Part time <input type="checkbox"/>
Occupation (job title)	<input type="text"/>
Employer/business name	<input type="text"/>
Business type/industry	<input type="text"/>
Date employment commenced	<input type="text"/>
Are you a shareholder – if yes, percentage held	<input type="text"/>
Company registration no. (if applicable)	<input type="text"/>
National ins. no.	<input type="text"/> Planned retirement age <input type="text"/>
If you have any additional employment please provide details below	

#### Section 4. The loan

Value of the property	<input type="text"/>	Deposit & other funds available	<input type="text"/>
Purchase price (if lower)	<input type="text"/>	Source of own funds	<input type="text"/>
Existing loan/s to be repaid	<input type="text"/>	Repayment method	<input type="text"/>
New loan required	<input type="text"/>	If part retained, no. of months interest to be retained	<input type="text"/>
Term of loan required	<input type="text"/>	Exit/loan repayment strategy	<input type="text"/>

#### Re-bridging existing loans only

Have you approached your existing lender  Please use notes section to inform us of the outcome or, reasons they have declined to lend

Who is named on this loan

If borrowing additional funds, state amount required  And the purpose

Name of current lender  Date you purchased the property

Current Loan account no  Date the loan commenced

Term left on the loan   Any charges or penalties existing on this loan

#### Section 5. The property *(being used as security for the new loan)*

Residential only ☐ Commercial only ☐ Mixed use ☐ HMO ☐ Multi-unit freehold ☐ other ☐

Full address & postcode  When was the property built

Ownership title

If leasehold how many years remain in the lease  Who will own the freehold

No. of Bedrooms  Bathrooms  Kitchens  Living rooms  other

Flats. no. in the block  Storeys in the building  Floor no. the flat is located on

If a commercial, mixed-use or non-standard property please provide a further description in the notes section

#### Section 6. The additional security 1<sup>st</sup> & 2<sup>nd</sup> charge *(cross collateral applications)*

Current value	<input type="text"/>	Original term	<input type="text"/>	Full address & postcode <input type="text"/>	
Current loan	<input type="text"/>	Term remaining	<input type="text"/>		
Monthly cost	<input type="text"/>	Redemption penalty	<input type="text"/>		
Interest rate	<input type="text"/>	Penalty end date	<input type="text"/>		
Describe Property type		<input type="text"/>		Year built	<input type="text"/>

#### Section 7. Refurbishment & exit

Build/works costs	<input type="text"/>	When did/will works commence	<input type="text"/>	Planning required	<input type="checkbox"/>
Loan required for works	<input type="text"/>	Expected duration of build/works	<input type="text"/>	Planning obtained	<input type="checkbox"/>
Contingency	<input type="text"/>	Refurbishment type	<input type="text"/>	Works under PD	<input type="checkbox"/>
Professional/other fees	<input type="text"/>	For works funding, anticipated number of drawdowns required	<input type="text"/>		
Expected GDV at completion	<input type="text"/>	If refinancing with a BTL loan, anticipated monthly rental income	<input type="text"/>		

Please provide details of planned works

Please provide details of past experience

## Section 8. Ltd Co./LLP applications

Company/Partnership name	<input type="text"/>				Co. registration no.	<input type="text"/>
Registered office address		Registered trading address				
<input type="text"/>		<input type="text"/>				
Nature of business (SIC)	<input type="text"/>					
	Name	Position	%	Nationality	UK resident	
Director/shareholder 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	
Director/shareholder 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	
Director/shareholder 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	
Director/shareholder 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

## Section 9. Professional advisers

Solicitor/legal representative		Accountant/qualified tax adviser	
Solicitor name	<input type="text"/>	Accountant name	<input type="text"/>
Name of firm	<input type="text"/>	Name of firm	<input type="text"/>
Address & postcode	<input type="text"/>	Address & postcode	<input type="text"/>
Telephone no.	<input type="text"/>	Telephone no.	<input type="text"/>
Email address	<input type="text"/>	Email address	<input type="text"/>

## Section 10. Regulatory & eligibility questions

Do you currently own your main residence?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you and/or any family member lived in or intend to live in any property connected with this application?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Does any applicant have any adverse credit, CCJs, Defaults or missed payments on their credit record?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have all applicants taken professional tax advice before setting up any limited company structure?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Is this your first bridging loan?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Has any applicant approached any other lenders or brokers in connection with this enquiry?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

## Important information

The purpose of this document is to help us understand your needs. Our assessment and any terms or quotes issued will be based solely on the information provided in this form. Loans will not be granted on this data alone and you may need to provide further information and evidence to support all the data you have given us should you wish to apply for any mortgage or loan. Any rates offered are not guaranteed, may only be valid on the day they were issued as lenders may change rates, criteria, terms and conditions at any time. We cannot offer any guarantees you will be able to obtain any mortgage or loan based on the information provided in this form and we cannot be held responsible for any decision made by any lender. All regulated firms will carry out their own background checks on the validity of the information you provide to us and any suspicious activity will be reported to the appropriate authorities

## Declaration

I/we confirm that the information provided in this document is true, accurate and can be evidenced if required

Applicant 1		Applicant 2	
Full name	<input type="text"/>	Full name	<input type="text"/>
Date	<input type="text"/>	Date	<input type="text"/>

Office notes

## Section 11. Notes