

## 1. Broker details

All introducers involved in the transaction must be listed here

Shawbrook broker partner details (submitting intermediary)

Name of firm	Contact name
Telephone	Email
Level of advice given (by submitted intermediary)	Advised sale <input type="checkbox"/> Execution only <input type="checkbox"/>
FCA number	Please confirm you have the correct permissions Yes <input type="checkbox"/> No <input type="checkbox"/>

### Other introducer details (1)

Name of firm	Contact name
Telephone	Email
Level of advice given (by submitted intermediary)	Advised sale <input type="checkbox"/> Execution only <input type="checkbox"/>
FCA number	Please confirm you have the correct permissions Yes <input type="checkbox"/> No <input type="checkbox"/>

### Fees paid prior to submission

Have any broker fees been charged to the client prior to submission?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Type of fee	Amount £
Is this fee refundable	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, how much is refundable? £	When is this refundable? <input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
Broker completion fee amount £	

### Fees to be added to your loan

Please note that these fees may be paid up front or added to the loan advance. Please confirm if the following fees are to be added to the loan advance.

Arrangement fee <input type="checkbox"/>	Telegraphic transfer fee <input type="checkbox"/>	Shawbrook solicitors fee <input type="checkbox"/> <small>(please note that this fee covers Shawbrook Banks legal costs only. Your conveyancer may charge an additional fee which you will need to pay directly to them).</small>
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## 2. Loan & product details

Loan amount £	Target completion date <input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
<b>Please note that we will add any agreed fees to the loan amount you have requested, together with the interest due for the term of the mortgage.</b>	
Product code RB1 <input type="checkbox"/> RB2 <input type="checkbox"/>	Repayment type Interest roll-up <input type="checkbox"/>
Loan term months (12max)	Loan type Purchase <input type="checkbox"/> Auction purchase <input type="checkbox"/> Remortgage <input type="checkbox"/>

### 3. Existing clients

We are pleased to offer a 0.25% discount on the margin OR a 0.25% reduction on the arrangement fee on loans up to £750,000, for any clients who have been party to a formally sanctioned loan with Shawbrook.

If the client has an existing relationship with Shawbrook Bank (Commercial Mortgages, Savings, Secured Lending, Asset Finance, Consumer Lending, Business Credit). Please tick here

Account/reference number

If you have ticked this box, you are entitled to a discount on this regulated bridging application, please confirm whether you require the discount on the rate margin or the arrangement fee?

Rate margin

Arrangement fee

### 4. Exit strategy

Sale of property

Refinance onto personal mortgage

Refinance onto BTL mortgage

Other  Please give details

### 5. Income & affordability

Please confirm that you have assessed the clients affordability for the loan requested

Yes  No

Please confirm

Total annual income £

Total annual expenditure £

**NB:** If the proposed exit is by a Personal Mortgage, we can assess the proof of income requirements as per European Standardised Information Sheet (ESIS) conditions prior to valuation instruction (24 hour SLA).

### 6. Applicant details

Information	Borrower/guarantor 1	Borrower /guarantor 2
Title		
Surname		
Forename(s) (including any middle names)		
Permanent residential address/ correspondence address for company		
Date of birth	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y
Number of children in household aged 17 or under		
Number of occupiers aged 18 or over		

Nationality		
Country of birth		
Previous address if less than 3 years		
Home telephone number		
Mobile telephone number		
Have you ever been convicted of a criminal offence	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

**If you answered yes to the above, please provide a full explanation below including what it was in relation to, when it occurred, and whether the situation has now been fully resolved.**

Details

## 7. Security

Security address

If remortgage  Unencumbered or outstanding mortgage balance £

Property type      House       Flat       Maisonette

Tenure      Freehold       Leasehold       If leasehold, how many years remain on the lease?

Estimated value £      Purchase price/price paid £      LTV requested      %

Is the property currently tenanted      Yes       No       Rental income £

Are works being completed on the property      Yes       No

If yes, please confirm the expected cost of these works £

Additional security address

Property type      House       Flat       Maisonette

Estimated value £      Charged offered      First charge       Subsequent charge

Outstanding first charge balance £

## 8. Exceptions

We accept that clients can't always tick all the boxes, therefore if this case is outside any of our published criteria please outline the mitigating factors here to ensure it is given the correct consideration.

## 9. Data protection checklist

**Must be fully completed before we can complete any searches. Please complete all items on this checklist.**

Please confirm who read Shawbrook's privacy script to the applicant(s): Shawbrook broker  Other introducer

If the script was read by 'Other introducer', the Shawbrook broker partner must countersign below and by doing so will be confirming that: (a) the 'Other introducer' is known to them; and (b) the 'Other introducer' has read Shawbrook's most recent privacy script (as found on the Shawbrook Broker Hub).

I have read the most recent Shawbrook privacy script (as found on the Shawbrook Broker Hub), and which contains details about Shawbrook's privacy notice, credit reference agency searches and the C-R-A-I-N to the applicant(s), and they have confirmed that they wish to proceed with the application.

Date and time script read to the applicant(s)

If by telephone, was this recorded?

Yes  No

**Broker partner signature**

**Other introducer signature**

Print Shawbrook broker name

Print other introducer name

Date

Date

## 10. Solicitors details

**Solicitors must be registered with the Law Society. Please note Licensed Conveyancers are not acceptable.**

Please tick if you would like our Solicitors to send their standard requisitions and a formal undertaking letter to the applicant's solicitors for completion. Please note, legal work will not begin until we are in receipt of a signed

Name of firm

Contact name

Telephone

Email

Address

**Please note: until the data protection checklist is fully completed and signed, we cannot undertake any credit searches**