

Broker Case-Submission Template

Complete and send this summary to help us triage and respond to your case quickly. Fields marked as indicative are for guidance only.

Broker details

- Firm name and your name
- Contact email and telephone
- How you would like to receive updates

Borrower & transaction

- Borrower / SPV name and structure
- Facility type (bridging, refurbishment, finish & exit, development)
- Loan amount required and business purpose
- Requested term and required drawdown date

Security & figures

- Security address and property type
- Current value / purchase price and any GDV (indicative)
- Existing debt and proposed charge ranking

Exit & notes

- Proposed exit and supporting evidence
- Borrower experience
- Any adverse credit or time pressures we should know about

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