

Introducer details

Contact name:

Company name:

Telephone number:

Regulatory status:

☐ Directly Authorised ☐ Appointed Rep ☐ Commercial Broker

Network or club:

 (if applicable)

Network FCA number:

 (if applicable)

Individual FCA number:

Fees And Advice

Who is advising the client? Intermediary (you) ☐ Positive Lending ☐

Are you charging the client a fee? Yes ☐ No ☐

If yes, how much? £

If yes, when are you charging the client? Upfront ☐ On application ☐ On offer ☐ On completion ☐ Add to loan ☐

Customer Vulnerability

Are you aware of any additional vulnerabilities that your client may have? Yes ☐ No ☐

If you answer yes to this question, please provide further information below and continue on the Additional Details Page if necessary.

Loan Details

Loan type: Refinance ☐ Purchase ☐

Loan amount requested:

£

Loan purpose:

Application FCA regulated? Yes ☐ No ☐

Date funds required:

Application type: Personal ☐ Limited company ☐

Limited Company Details

Company name:

Registration number:

Number of directors:

Business start date:

Country of incorporation:

Security Property

Security Address	Ownership Joint, sole ownership, LTD company	Value/ Purchase price of the property	Outstanding First Charge Balance (If applicable)	1st or 2nd charge	Secured charge lender	Property Use (BTL, main residential, Multi-Unit, HMO, Holiday Let)

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:

Applicant Details

Applicant 1 / Director 1:

Applicant 2 / Director 2:

Title:		
First name(s):		
Surname:		
Date of birth:		
Mobile telephone:		
Email:		
Marital status:		
Nationality:		
Country of residence:		
Annual income:	£	£
Employed/self-employed:		
Employer name:		
Time at current employer/ at self-employment	YY / MM	YY / MM
Current address (If less than 3 years at their current address, please provide details of previous addresses in the Additional Details section)		
Date moved in:	DD / MM / YY	DD / MM / YY
Residential status:		
Mortgage Lender name (if applicable):		
Estimated property value:	£	£
Loan outstanding:	£	£

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

If yes, please provide details:

Please provide any further information on the Additional Details Page.

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 & ADDITIONAL NEEDS DECLARATION

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

1. 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.

2. The consent given to use personal information we will assume expires on the completion of the loan or cancellation of this application if sooner. Full details of how we hold, process and manage personal information are explained within our privacy statement on our website.

3. By signing below you agree that we are able to approach all lenders to ensure we secure you the best option based on payment & criteria. If you do not agree to this please speak to our advisor.

4. 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

Positive Lending (UK) Limited, trading as 'Positive Lending', is Authorised and Regulated by the Financial Conduct Authority FRN 607682

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Additional Details

Please provide any additional information to support this application:

Thank you for your enquiry

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