

Large Loans Underwriting Pre-submission sheet



Enquiry reference number
(for bank use)

Broker Name

Broker Firm

Contact telephone number

Customer Name and Age on application

Bank Details (if Natwest customer)

Residency Status (i.e EU settlement)

Loan Requirements (Purchase Price/Valuation)

Term

Repayment strategy
(if interest only):

Income and Employment/self employment details

Detail of assets, liabilities, saving and investments, i.e. school fees, credit cards, car finance, overdraft and maintenance, property, shares

Any additional consideration or complexity

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