

PLEASE NOTE: CASES THAT FIT CRITERIA DO NOT NEED TO BE REFERRED

This form should be completed in full when a case does not fit criteria, when "referral" is indicated in the plans or by product wizard on Broker Venue or Broker Disc.

Please complete this form in full and submit it with a full application form and all other pertinent information, for an in-principle decision.

SECTION A

| | | | |
|-----------------------|--|----------------------|--|
| Broker Name | | Contact Name | |
| Contact Number | | Email Address | |

| | | | |
|---------------------|--|-------------|--|
| Name of Case | | | |
| Postcode | | Date | |

| | | | | |
|---------------------------|--------------------|--------------------------|----------------------|--------------------------|
| Type of Charge: | First Charge | <input type="checkbox"/> | Second Charge | <input type="checkbox"/> |
| Property Category: | Commercial | <input type="checkbox"/> | Buy to Let Portfolio | <input type="checkbox"/> |
| | Semi-commercial | <input type="checkbox"/> | | |
| Product: | Term Mortgage/Loan | <input type="checkbox"/> | Bridging Finance | <input type="checkbox"/> |

| | | | | | |
|--|---------------------------------|---------------------------------|-------------------------------------|--------------------------|--------------------------|
| Number of Demerits (see criteria for description) | | Current Valuation | £ | Market Valuation | <input type="checkbox"/> |
| | | | | 90 Day FSV | <input type="checkbox"/> |
| Property Type | A Type <input type="checkbox"/> | C Type <input type="checkbox"/> | | | |
| Total Loan Amount (including Broker fee) | £ | First Charge Lender | Conforming <input type="checkbox"/> | Non-conforming | <input type="checkbox"/> |
| Loan to Value | % | Income Source | Employed <input type="checkbox"/> | Self-employed 1-3 years | <input type="checkbox"/> |
| | | | Other <input type="checkbox"/> | Self-employed 3+ years | <input type="checkbox"/> |
| Applicant 1 Income | £ | Total <u>Net</u> Income | £ | Income Percentage | % |
| Applicant 2 Income | £ | | | | |

Which is the closest plan that this case does NOT fit?

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|--|--|
| Lancashire Mortgage Corporation e.g 65% | |
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SECTION B

On the plan you have detailed above what is the:

| | | | | | |
|-----------------------------------|---|------------------------------------|---|---|---|
| Maximum LTV ? | % | Minimum Valuation? | £ | Maximum Loan? | £ |
| Maximum Income Percentage? | % | Maximum number of Demerits? | | Maximum Demerits in specified period? e.g. (2 in 6) | |

Reason for referral and additional merits (please continue on additional sheet if required):