  
**Intermediary Referral Request Form**

|  |  |  |  |
| --- | --- | --- | --- |
| Broker Name & Title |  | | |
| Firm Name |  | Telephone Number |  |
| FCA Number |  | Email |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Applicants Name |  | Applicants Name |  |
| Occupation |  | Occupation |  |
| Income Applicant 1 |  | Income Applicant 2 |  |
| Basic |  | Basic |  |
| Overtime/Comm |  | Overtime/Comm |  |
| Bonus |  | Bonus |  |
| Rental Income |  | Rental Income |  |
| Benefits |  | Benefits |  |
| Share of Net Profit |  | Share of Net Profit |  |
| Dividends |  | Dividends |  |
| Outgoings |  | Outgoings |  |
| **Income(after deductions)** |  | **Income(after deductions** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Property Type |  | | | | |
| Loan Type | First Time Buyer | Family Assist | Remortgage | Into / In Retirement | Homemover |
| Loan Amount |  | | | | |
| Purchase Price / Estimated Final Val |  | | | | |
| Loan to Value |  | | | | |
| Repayment Method |  | | | | |
| Term |  | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Reason for Referral**   |  |  |  |  | | --- | --- | --- | --- | |  |  | Credit History\* |  | |  | |  | Employment History\* |  | |  | |  | Other\* |  | |  |   **\* Please add addition information e.g. employment history in the note section overleaf.** | | | |
| **\* Additional/Supporting information**  **Email completed form to:** [**brokers@theloughborough.co.uk**](mailto:brokers@theloughborough.co.uk) | | | |
| **Management Assessment** (This section to be completed by relevant mandate holder) | | | |
| **Referral Approved/Rejected** (mark as appropriate) | | **Approved** | **Rejected** |
| **Rationale for approval/rejection** (include consideration of customer outcomes) | | | |
| **Referral approved subject to following conditions:** (Specify any additional conditions or info required  **Subject to satisfactory valuation, Income confirmation and no further credit issues other than those declared** | | | |
| Approved by: | Signature: | | Date: |

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