

1. Company/Business Name:

2. What does the business do?

- | | | | |
|--|--|--|---------------------------------------|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Automotive | <input type="checkbox"/> Business Service | <input type="checkbox"/> Construction |
| <input type="checkbox"/> Courier | <input type="checkbox"/> Distribution | <input type="checkbox"/> Financial Services | <input type="checkbox"/> Haulage |
| <input type="checkbox"/> Healthcare/Care | <input type="checkbox"/> Hotel/Guest or Public House | <input type="checkbox"/> Import/Export | <input type="checkbox"/> IT Related |
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Print/Publishing | <input type="checkbox"/> Professional Services | <input type="checkbox"/> Property |
| <input type="checkbox"/> Recruitment | <input type="checkbox"/> Retail | <input type="checkbox"/> Security Services | <input type="checkbox"/> Trade |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> Wholesale | <input type="checkbox"/> Other | |

3. Trading as a:

- Sole Trader
 Limited Company
 Limited Liability Partnership
 Startup
 Partnership

4. How long has the business been trading for? years

5. What is the businesses annual turnover? current year £

6. Who do you currently bank with?

7. Does the business bank account have an overdraft?

- Yes
 No

7.1. If so, how much?

£

8. Do you have any existing finance facilities in place?

- Yes
 No

8.1. If so, what are they?

9. Do you or your business have any of the following?

- Missed Repayments
 CCJs Outstanding

10. What do you want/ need the new finance for?

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> Day to day cashflow | <input type="checkbox"/> Business expansion | <input type="checkbox"/> Equipment/Asset finance | <input type="checkbox"/> Refinancing debt |
| <input type="checkbox"/> Import/Export | <input type="checkbox"/> Tax bill due | <input type="checkbox"/> Acquiring a business | <input type="checkbox"/> Starting a business |
| <input type="checkbox"/> Purchasing a property | <input type="checkbox"/> Purchasing stock | | |

11. Have you approached your bank or any other banks?

- Yes
 No

11.1 If so, what was the outcome from this?

- Offer
 Approved
 Rejected

12. Do you have any security in the UK? What value can be secured?

- House
 Asset
 £
-

13. For how long do you require the loan?

- | | | | |
|---|--|------------------------------------|----------------------------------|
| <input type="checkbox"/> 6 months or less | <input type="checkbox"/> 12 months | <input type="checkbox"/> 24 months | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 4.5 years | <input type="checkbox"/> More than 5 years | | |

14. Select your preference for any of the following lending products:

Yes No

Secured Term Loan

Unsecured Term Loan

Short or Flexible Facility

Invoice Finance

Yes No

Merchant Cash Advance

Trade Finance

Asset Finance

Property Finance

15. Documents we recommend to collect to get an indicative offer from lenders:

Most lenders require the following documents:



Latest available (and draft) 1 year unabbreviated filed accounts

Latest 6 months bank statements

Latest management accounts / Management information

Latest 4 quarter VAT returns

D.O.B and living address with those of at least 51% shareholding *

* or those to be providing the PGs if applicable.

16. How should we proceed with your funding enquiry?

Create a Funding Report

Instant

Report without pricing

Without submitting to lenders get a report built by capitalise's recommendation engine

Start a Funding Search

1-4 days

Indicative offers from lenders

Get terms and pricing by engaging with lenders to get offers

17. Agreement to continue with funding search

I agree to have information and documents shared with selected lenders:

Signature: _____

18. Additional notes
