

This form can be completed electronically, saved and printed. If completing manually, please complete in black ink and BLOCK CAPITALS. Complete all boxes that apply.

**1. Mortgage Application**

Applicant Name

Limited Company Name

Application Reference Number

**2. Business Information**

Please confirm the following information.

Date company commenced trading

Date applicant joined the company

Business Address

Applicant percentage Shareholding

**3. Finalised Accounts**

Please provide as a minimum the previous three years trading information. For less than two years trading please provide a minimum of one year plus a projection in the section provided.

| Period  | Latest Year End        |                      | Previous Year End      |                      | Previous Year End      |                      |
|---|------------------------|----------------------|------------------------|----------------------|------------------------|----------------------|
|   | From                   | To                   | From                   | To                   | From                   | To                   |
| Trading Period start and end dates                    | <input type="text"/>   | <input type="text"/> | <input type="text"/>   | <input type="text"/> | <input type="text"/>   | <input type="text"/> |
| Turnover  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Gross Profit  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Net Profit  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Total Dividend  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Closing cash balance                                  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Total Assets  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Total Liabilities                                     | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Shareholder Funds                                     | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Applicants Dividends                                  | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Applicants Salary                                     | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |
| Applicant Share of Net Profit (after Corporation Tax) | £ <input type="text"/> |                      | £ <input type="text"/> |                      | £ <input type="text"/> |                      |

**4. Projection**

Please only complete this section if the company has been trading less than two years.

| Period  | Projection   |
|---|--|
| Trading Period start and end dates                    | From <input type="text"/><br>To <input type="text"/> |
| Turnover  | £ <input type="text"/>                               |
| Gross Profit  | £ <input type="text"/>                               |
| Net Profit  | £ <input type="text"/>                               |
| Total Dividend  | £ <input type="text"/>                               |
| Closing cash balance                                  | £ <input type="text"/>                               |
| Total Assets  | £ <input type="text"/>                               |
| Total Liabilities                                     | £ <input type="text"/>                               |
| Shareholder Funds                                     | £ <input type="text"/>                               |
| Applicants Dividends                                  | £ <input type="text"/>                               |
| Applicants Salary                                     | £ <input type="text"/>                               |
| Applicant Share of Net Profit (after Corporation Tax) | £ <input type="text"/>                               |

**5. Other Income**

| Period                               | Latest Year End                                      | Previous Year End                                    | Previous Year End                                    |
|--------------------------------------|--|--|--|
| Trading Period start and end dates   | From <input type="text"/><br>To <input type="text"/> | From <input type="text"/><br>To <input type="text"/> | From <input type="text"/><br>To <input type="text"/> |
| Gross Profit from UK Land & Property | £ <input type="text"/>                               | £ <input type="text"/>                               | £ <input type="text"/>                               |
| Net income after Finance Costs       | £ <input type="text"/>                               | £ <input type="text"/>                               | £ <input type="text"/>                               |

**6. Supporting Information**

Please provide additional supporting information in relation to decreasing or fluctuating income or any additional supporting information you feel is relevant.

**7. Accountant Declaration**

I can confirm that the information provided is a true and accurate summary of my client's income. I can confirm that as far as I am aware there have been no adverse or material changes to the business to date.

|   |                      |                            |                      |
|---|----------------------|----------------------------|----------------------|
| Accountancy Firm name:  | <input type="text"/> | Telephone Number:          | <input type="text"/> |
| Address:  | <input type="text"/> | Email Address:             | <input type="text"/> |
| Postcode  | <input type="text"/> | Signed:                    | <input type="text"/> |
| Company Stamp:<br>(if no company stamp is available please provide a company letterhead)  | <input type="text"/> | Print name:                | <input type="text"/> |
|   |                      | Date:                      | <input type="text"/> |
|   |                      | Accountants qualification: | <input type="text"/> |
| Registered in <input type="checkbox"/> Firm Name <input type="checkbox"/> Individual Name |                      | Membership number:         | <input type="text"/> |

**Your Personal Information and what we do with it**

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