Graphical user interface

Description automatically generated

**UNSECURED BUSINESS LOAN FACTFIND**

**Requirement**

|  |  |
| --- | --- |
| Amount Requested: | £Click or tap here to enter text. |
| Repayment Term: | Click or tap here to enter text. |
| Purpose: | Click or tap here to enter text. |
| Date Funds Required: | Click or tap here to enter text. |

**How does the Business Operate**

|  |  |
| --- | --- |
| Does the business have an overdraft? | Yes  No |
| If yes, who provides it and what is the limit? | £Click or tap here to enter text. |
| Has the business taken on more than £25,000 of debt within the last 12 months? | Yes  No |
| If yes, who with and how much did the lender(s) advance? | £Click or tap here to enter text. |
| Where is most of your business conducted? | In Person  Online  Over The Phone |
| Does the client have a point of sale card machine? | Yes  No |
| Does the client have any short term business loans? | Yes  No |
| If yes, who are they with and how much is outstanding? | Click or tap here to enter text. |
| Do you or your accountant(s) use accountancy software (e.g Sage, Xero, Kashflow). If so, which one? | Click or tap here to enter text. |

**Client to provide the following (as appropriate):**

**Last 2 years’ audited or certified accounts for the business**

**Up to date management information if the year-end was more than nine months ago**

**Last 3 months’ business bank statements**

**Last 4 quarters’ VAT returns**