A picture containing text, font, graphics, logo

Description automatically generated**Proposal form**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1. Business Information** | | | | | | | | |
| Business Name |  | | Main Contact Name | | |  | | |
| Registered No. |  | | Email | | |  | | |
| Registered Address |  | | Business Phone | | |  | | |
| Trading Address |  | | Mobile Phone | | |  | | |
| Company Type |  | | Annual Business Turnover | | |  | | |
| Number of Staff |  | | Date Trading Commenced | | |  | | |
| Business Activity |  | | CCJs / CVA’s / IVAs or Bankruptcy’s | | |  | | |
|  | | | | | | | | |
| Full Name |  | | Date of Birth | | |  | | |
| Shareholding % |  | | Homeowner? | | |  | | |
| Home Address |  | | Previous address if < 3yrs | | |  | | |
|  | | | | | | | | |
| Full Name |  | | Date of Birth | | |  | | |
| Shareholding % |  | | Homeowner? | | |  | | |
| Home Address |  | | Previous address if < 3yrs | | |  | | |
|  | | | | | | | | |
| Full Name |  | | Date of Birth | | |  | | |
| Shareholding % |  | | Homeowner? | | |  | | |
| Home Address |  | | Previous address if < 3yrs | | |  | | |
| **3. Existing Finance** | | | | | | | | |
| Finance Type  (Invoice Finance / Asset Finance / Unsecured Loans / Overdraft) | Finance Provider | | Finance Amount | | Balance | | | Finance Rate |
|  |  | |  | |  | | |  |
|  |  | |  | |  | | |  |
|  |  | |  | |  | | |  |
| **4. Loan Required** | | | | | | | | |
| Loan Amount | |  | | Loan Term | | |  | |
| Loan purpose | |  | | | | | | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **5.1. Shareholder Asset & Liability** | | | | | | |
| Individuals Name | | |  | | | |
| Asset (property address) | | | Value (£) | | Liability (mortgage) | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
| **5.2. Shareholder Asset & Liability (continued)** | | | | | | |
| Individuals Name | | |  | | | |
| Asset (property address) | | | Value (£) | | Liability (mortgage) | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
| **5.3. Shareholder Asset & Liability** | | | | | | |
| Individuals Name | | |  | | | |
| Asset (property address) | | | Value (£) | | Liability (mortgage) | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
|  | | | £ | | £ | |
| **6. Important Declaration** | | | | | | |
| Upon successful funding for your business, a 0% fee is payable which Help2Finance Ltd will invoice you directly for prior to you receiving your funds.  This proposal form asks for personal data relating to directors, shareholders, partners, members & proprietors. The information which is collected will be used in order to administer our relationship with you, to provide our services to your organisation and to properly conduct our business. This personal information will also be used by Help2Finance or any of its partners, agents and affiliates for the purpose of conducting credit reference checks in respect of those individuals whose details are included on the proposal form. | | | | | | |
| Print Name: |  | Signature: |  | Date: | |  |