

together.®



Your guide to MBV

For professional intermediary use only





Introducing your guide

We're delighted to welcome you to our panel of packaging partners at Together.

This 'how-to' guide is designed for partners who use MyBrokerVenue to submit business to Together, in particular:

1. Principals and individual brokers at partner firms who have recently been on boarded.
2. New starters at existing partner firms.
3. Partners seeking hints and tips for submitting business efficiently.

For professional intermediary use only





How to use your guide

Your guide is divided into chapters. Skip to the most relevant chapter by clicking on the links below.

1. Registering on MyBrokerVenue (MBV)
2. Setting up with 3rd parties
3. Creating a quote on MBV.
4. How to submit a referral.
5. Submitting and validating full cases.
6. Packaging and uploading cases.
7. Checking progress.

Registering on
MyBrokerVenue (MBV)
as a Company
and Individual.



together.®



Registering on MyBrokerVenue

Here you'll find:

- Guidance for Principals
- Guidance for individual employees



Login

Username
Password

Login >

[Forgotten your password?](#)

Register

Register for My Broker Venue now, it's quick and easy and gives you access to our product quote engine and online application.

Register



Tools and Tips

Gives you access to:

- Quick quote calculator
- Product wizard
- Easy to use online application process
- Lending criteria
- Industry updates



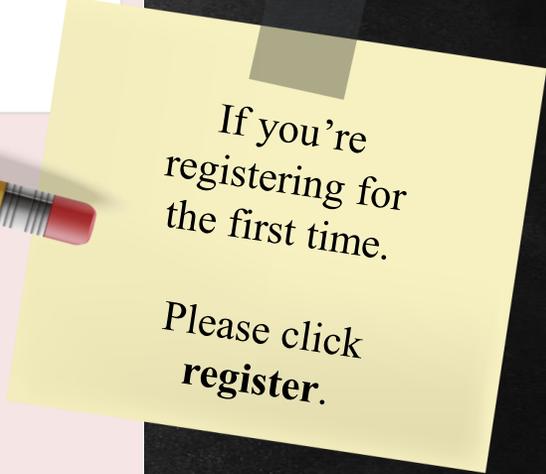
Our products and services

- Specialist lenders
- Easy to do business with
- Personal service
- Many status profiles
- Flexible solutions



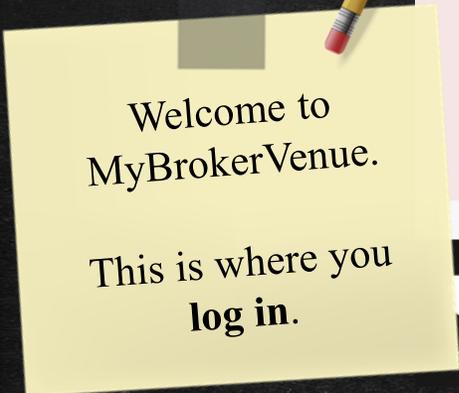
Get in touch

- Secured loans
- Mortgages
- Buy to let
- Commercial lending
- Bridging finance



If you're registering for the first time.

Please click **register**.



Welcome to MyBrokerVenue.

This is where you log in.





If you're a Principal of a company registering for the first time, please complete this form.

My Broker
A Site Dedicated to Helping You Grow Your Business

together.™
Loans, mortgages & finance.

Register

Registering on my broker venue

Simply complete the below form to register with us. Once you've submitted your details a member of our broker relations team will contact you to discuss your requirements and activate your account.

If you need help with completing the registration process please use our **How to Guide**. Or Call us on: 0161 933 7100

I am an employee of a company already registered on My Broker Venue. I am registering a company for the first time.

Tell us about your company...

Please indicate which of the following best describes your business, please select all that are applicable.

<input type="checkbox"/> Mortgage broker	<input type="checkbox"/> Compliance network	<input type="checkbox"/> Bridging finance broker
<input type="checkbox"/> Mortgage packager	<input type="checkbox"/> Mortgage club	<input type="checkbox"/> Commercial finance broker
<input type="checkbox"/> Secured loans broker	<input type="checkbox"/> Wealth manager	

Trading details

ICO registration number Companies house number

Company name Do you use any trading styles?

Company trading address

Building number Building name

You'll now be provided with your company's unique brokerage reference number.



My Broker
A Site Dedicated to Helping You Grow Your Business

Home About us

Register

Registering on my broker venue

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If you need help with completing the registration process please use our **How to Guide**. Or Call us on: 0161 933 7100

I am an employee of a company already registered on My Broker Venue. I am registering a company for the first time.

Tell us about your company...

Existing brokerage reference

Tell us about you...

First name Surname
Your landline no. Your mobile no.
email Verify your email
password details password must be at least 8 characters with uppercase, lowercase and a digit. Verify your password

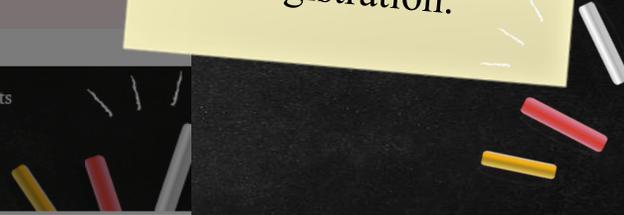
I am not a Sole Trader / Partnership I am a Sole Trader / Partnership

If you're an employee at a company that's already registered you'll need your company's unique brokerage reference number.

How to find your brokerage reference number?
Ask your Principal OR call the team on 0161 933 7101.

Please note:
All employees seeking to submit or manage pipeline business with us will need to register **individually**.
Please don't share log-in details

A member of our team will be in touch to verify your registration.





Setting up with third parties





Get set up with third parties

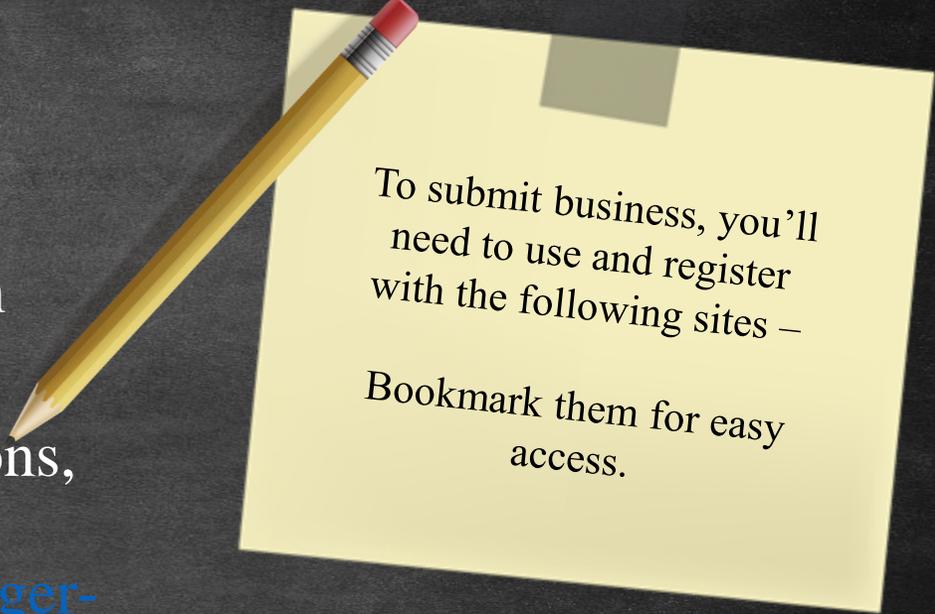
Speed up your submissions by registering with the relevant people to help you instruct a case:

- Land Registry Search
- Hometrack for AVMs
- Our Panel Valuers in England and Wales
- Our Panel Valuers in Scotland



Essential info for England and Wales

- Land Registry Search - www.landregistrysearches.com/
- For setting up AVMs you'll need to register with Hometrack - www.hometrack.com/contact-us/
- For additional info on AVM criteria and valuations, read our <https://togethermoney.com/intermediaries/packager-product-guides>



To submit business, you'll need to use and register with the following sites –

Bookmark them for easy access.

together.®



Our Panel Valuers

We have multiple valuation options available including **AVMs**. Find our full valuation criteria [here](#)
Choose from different panel managers to help provide your clients with the best service:

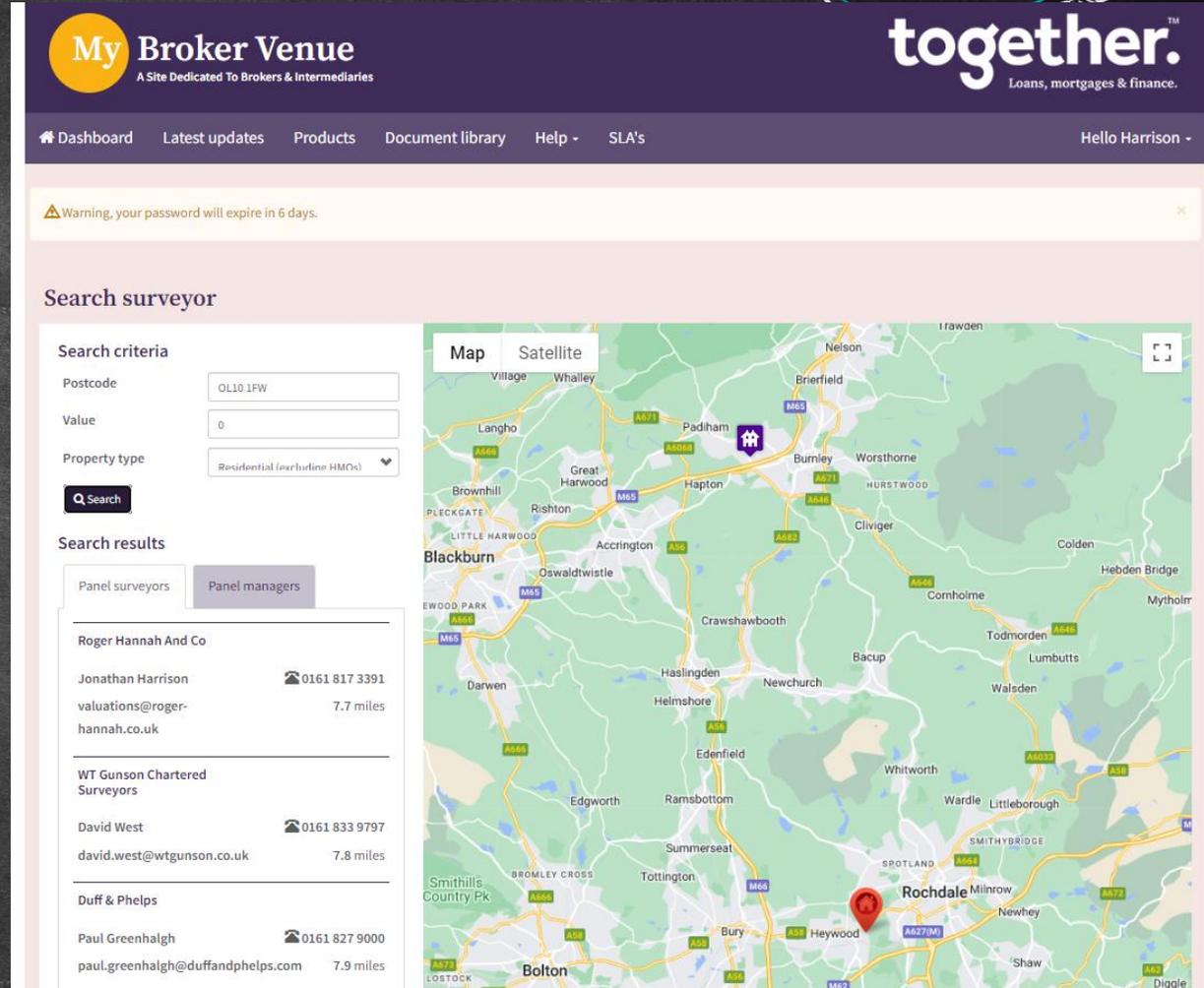
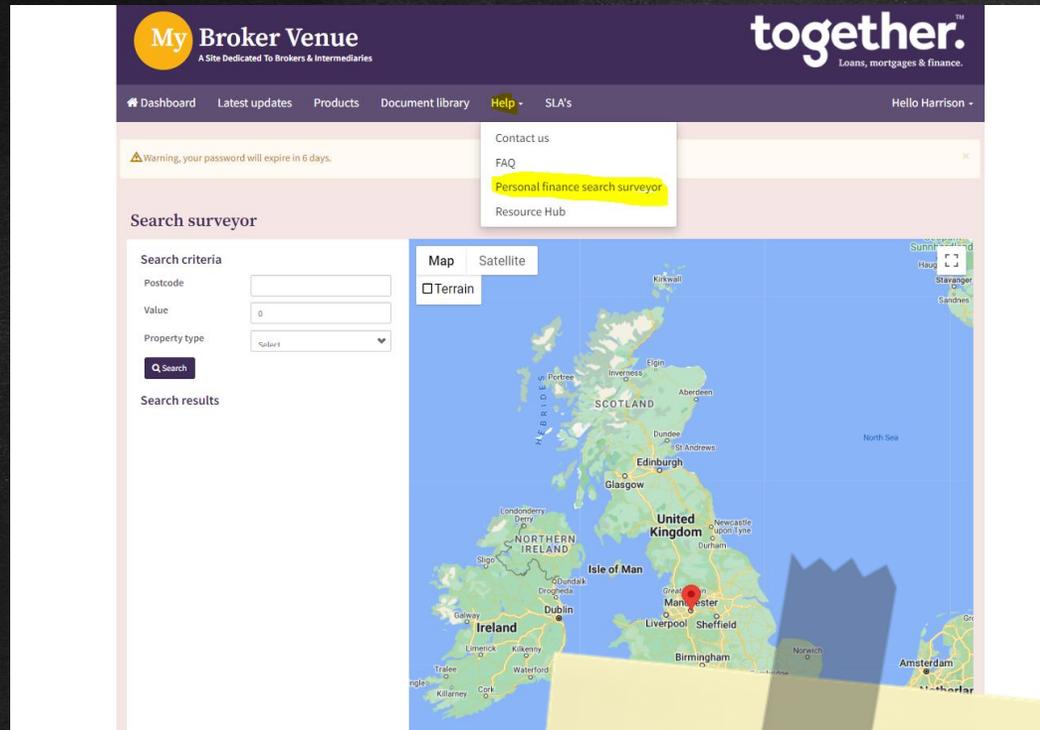
For Residential with a value <£2m

VAS, Method and Pure

Commercial/ Semi Commercial/ Land/ Residential with a value >=£2m

VAS and Method





Tip: in the 'Help' section on MBV, you'll find our 'Search' function. Use it to find your local valuer



Essential info for Scotland

- Register with Wilson McKendrick Solicitors before instructing your client's case
- If you're registering with them for the first time, email them at search@wilsonmckendrick.co.uk
- Inform them that that you need to conduct searches on behalf of Together Personal Finance or Together Commercial Finance
- You'll then receive a brief application form to fill in
- Your registration will be complete usually within 24-48 hours.
- Please note Wilson McKendrick Solicitors can help with applications in a personal name (including capital raise/re-finance), Scottish security only, under £300k where there no changes to the land registry
- If your case is more than £300k, please refer to the Legal Guides on our webpage: <https://togethermoney.com/intermediaries/packager-product-guides>



Creating a quote on MBV





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Loans, mortgages & finance

Dashboard Latest updates Products Document library Help SLA's Hello Mark

Search

View my cases View all cases View summary

Arrange By: Date - newest first Filter: Select Total 0

Product selector

Do you need help identifying

Our product selection rules have changed for business purpose loans and to incorporate Buy-to-Let products. You'll need to answer a few extra questions to correctly identify a CBTL product. These aren't available via the Quick Products tile.

£ Loan amount required? 0

Will borrower or a related person occupy >40% of the security? Yes

Loan charge type? Second charge

Property category? Residential occupied no rental income

Type of Product required? Term loan

Quote me now >

Quick product links

Residential - accredited brokers only

- Secured loans
- Residential Mortgages
- Regulated Bridge

Commercial

- Mortgages, loans and buy-to-let
- Bridging
- Homeowner Business Loan

together. Discover Chalk. Our resource hub for intermediaries. Find out more

Submission checklists

Use the 'Product selector' for CBTL only.

Use the 'Quick products link' for all other products.

Product selector

AN DETAILS CREDIT HISTORY APPLICATION

Complete the questions to find a suitable plan.

What type of Product required? Buy to let

What type of property offered as security? Standard Property

Is the property semi commercial? No

Is this a Purchase? Not a purchase Right to Buy? No

£ Loan amount required? 0 £ Estimated valuation of the security? 0

Is Interest Only? Select

Shared Ownership? No

Client's primary source of income? Employed income

Next >

Generate a quote by following the instructions here. Then press 'Next'



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Loans, mortgages & finance.

Dashboard Latest updates Products Document library Help SLA's Hello Marketing

Case Summary

Quote Ref: Q10660022 Copy Case Import Data

Repayments: 9.85% Residential Mortgages (FCA Regulated) - 299 instalments of £2,245.37 with a final payment of £2,345.37

Repayment type: Capital Repayment	Loan term: 300 months	Property value: £500,000.00	Plan: FIR101_PP
Loan amount: £250,000.00	Net LTV: 50.00%	Product type: Variable	APRC: 10.4%
Min Loan: £50,000.00	Max LTV: 60.00%	Commission: 1.25%	Nominal Rate: 9.85%
Max Loan: £1,000,000.00	Gross loan amount: £250,000.00		

Total amount to be repaid : £675,206.00

[Refer Application](#) [Commission split /service provider](#) [Fees](#) [Re-Quote](#)

Alternative plans available:

- 8.1% Two Years Fixed Term Loan (FCA Regulated) FIR101_F24_PP
- 7.74% Five Years Fixed Term Loan (FCA Regulated) FIR101_F60_PP
- 8.85% Two Year Discounted Rate Residential Mortgage (FCA Regulated) FIR101_D24_PP

Applicant Details !

Credit Profile

Security !

Affordability

LIR

Application Data !

Documents

Submission Checklist !

Validate

Save & Close

Work through the application chronologically until there are **no warnings** flagged and they're all ticked green (with the exception of affordability and LIR).

Upload a copy of the illustration.



How to submit a referral





Business Personal

Home > Intermediaries > Chalk > Your resource hub

Intermediaries

Your resource hub.

Keep up-to-date with the latest how to guides, information on how to work with Together and so much more.

Give us a call on **0330 818 5211** or [Get in touch](#)

We're open Mon-Fri 9am-5:30pm

Ready to contact our team? Give us a call on [0330 818 5211](#) or [Get in touch](#)

Packaging for us: commercial lending

Background Buy to Let 23.35MB PDF	↓
Guide to applications from overseas investors 3.97MB PDF	↓
Guide to care sector applications 12.6MB PDF	↓
Independent Legal Advise (ILA) - Why and when it's needed? 4.08MB PDF	↓
Internal Legal Process - How to fund cases quickly 4.04MB PDF	↓
My Broker Venue - Application Referral Guide 3.56MB PDF	↓

For help with handling referrals you can **download** a copy of the MyBrokerVenue **Application Referral Guide** from [Chalk](#), our resource hub for intermediaries.

At the Chalk Face: My Broker Venue – Application Referral Guide

If the referral is for an Unregulated Bridge application, please contact your Business Development Manager or Support Team on 0161 933 7101. For all other products, please follow the below steps.

- 1 Log into [My Broker Venue](#) with your login credentials. If you haven't previously logged in, please Register.
- 2 Use either the 'Product selector' or 'Quick product links' to produce a quote.
- 3 Click on 'Applicant Details' and add in the details of the applicant(s)*.
- 4 Click on 'Credit Profile' and run a 'Credit search' for the applicant(s).
- 5 To refer an application, click 'Refer Application'.
- 6 Complete the referral form.
 - a. Choose the 'Referral reason' and 'Referral details' from the drop-downs.
 - b. Write any supporting information in the commentary box
 - c. Select 'browse' to locate any applicable documents
 - d. Press 'save' and 'upload' to upload the document to the referral form
 - e. Add additional referral reasons if required.
 - f. If the applicant(s) is not a resident of the UK, please add their residential address into the 'Comments' section.

The screenshot shows the 'Application referral' form interface. It includes fields for 'Referral reason', 'Referral details', and 'Comments'. There are 'Save' and 'Upload' buttons. Below the form, there are sections for 'Attachments' and 'Review and upload'. A 'Submit referral' button is visible at the bottom right.

- 7 Once the referral form has been completed, click on 'Save and 'Upload' and 'Submit referral'.



Submitting and validating full cases





You can make any amendments to your quote.

Please remember to press 'Calculate' after every change.

Re-quote

Loan details Demerits

£ Loan Amount required 250000	£ Estimated valuation of the security 500000
Term 300	% Nominal Rate 8.10
<input type="checkbox"/> Override rate	£ Commission 3125
% Commission 1.25	
Type of product required Term loan	Type of property offered as security Standard Property
Is the property semi commercial No	Is this a Purchase Yes
Right to buy? No	Shared Ownership? No
Client's primary source of income? Employed income	Interest type Capital Repayment

Calculate

Quote details

8.1% Two Years Fixed Term Loan (FCA Regulated)

Repayments: 24 instalments of £1,946.13 followed by 275 instalments of £2,434.19 with a final payment of £2,534.19

Net Loan: £250,000.00 Plan: FIR101_F24_PP

Gross Loan: £250,000.00 Repayment type: Capital Repayment

Loan term: 300 months Nominal Rate: 8.10%

Property value: £500,000.00 Min Loan: £50,000.00

Max Loan: £1,000,000.00 Net LTV: 50.00%

APRC: 11.0% Commission: 1.25%

Product type: Fixed 2 Yrs Max LTV: 60.00%

Total amount to be repaid : £720,138.56

Alternative plans

- 9.85% Residential Mortgages (FCA Regulated) FIR101_PP
- 7.74% Five Years Fixed Term Loan (FCA Regulated) FIR101_F60_PP
- 8.85% Two Year Discounted Rate Residential Mortgage (FCA Regulated) FIR101_D24_PP

Cancel Confirm



Fee payment details

Lender

Fees	Fee amount	Interest	Total cost	Pre-paid?	Who is it payable to?	When is it payable?	Refundable?	Action
Repayment Admin Fee	£ 100	£0.00	£100.00	<input type="checkbox"/>	Lender	At Redemption	<input type="checkbox"/>	
Acceptance Fee	£ 1495	£0.00	£1495.00	<input checked="" type="checkbox"/>	Lender	Prior To Completion	<input type="checkbox"/>	
Totals	£1495.00	£0.00	£1495.00					

Third party

Fees	Fee amount	Interest	Total cost	Pre-paid?	Who is it payable to?	When is it payable?	Refundable?	Action
Totals	£0.00	£0.00	£0.00					

Third Party Questi...

Mortgage intermediary

Total Mortgage Intermediary fees ≥ £7,000 or 10% of the net loan will be referred for review prior to the case being funded. The review is to make sure that fair value to the customer can be demonstrated

- Total Fee Amount: £ 1495.00
- Total Interest: £ 0.00
- Total Cost: £ 1495.00
- Total Fee Amount to be pre-paid: £ 1495.00
- Total Fee Amount to be included in Loan(Excluding interest): £ 0.00
- Total Fee Amount to be included in Loan: £ 0.00
- Total Repayment Admin Fee Amount: £ 100.00

If your client wishes to add the **Lender Acceptance Fee** to their loan, please ensure that the pre-paid box is **UNTICKED**.



Please make sure you complete all mandatory fields featuring ***bold green text**.

Applicants details

New Applicant

Personal details | Employment | Credit history | Bankruptcy search

*** label** This information is required to save **label** This information is required before the application can be submitted

General		Residential details	
* Title <input type="text"/>	* First name <input type="text"/>	Country of residence <input type="text"/>	
Middle names <input type="text"/>	* Surname <input type="text"/>	Nationality <input type="text"/>	
Previous name / Other names <input type="text"/>	Marital status <input type="text"/>	Are there any indicators that suggest that the applicant could be vulnerable? <input type="text"/>	Select <input type="text"/>
* Date of birth <input type="text"/>	Anticipated Retirement Age <input type="text"/>		

Contact details

Home telephone Mobile

Email

Current address

Postcode **Lookup address**

Property number **Property name**

Street District

Town/City County

Date applicant moved to this address **Effective from date**

Current residential status

Top tip:
You'll need to include the client's last 3 years' address history.

You'll only be able to credit search 2 years' address history.



Applicants details

Mr John Smith

Personal details | **Employment** | Credit history | Bankruptcy search

* label This information is required to save label This information is required before the application can be submitted

Employed

Income - Method of payment	Income Evidence Select
Position	Employer
Work telephone number	Date employment commenced mm/yyyy
Is this a permanent position?	Select

Save

Employment type
Employed

Add applicant +

Close ✕

Make sure **all** your client's employment details are complete.

This info will pull through to the full **affordability** assessment.



Credit profile

Applicant details | Credit profile | Demerit summary

Consent

Do you have authority from the applicant(s) to perform this credit search?

You must notify the applicant(s) of the following:

All applicants consent to a soft credit check being undertaken. A soft credit check is only visible to the applicants on their credit report and does not affect their credit rating. If the applicants proceed to a full application and this is submitted to us, then a hard credit check will be undertaken. A hard credit check will be visible to other lenders and may impact their credit rating, as multiple hard credit checks in a short period of time could have a negative impact on the applicant's credit report.

All applicants have been made aware of the 'Credit Reference Agency Information Notice (CRAIN)' statement and where requested, have been provided with a printed copy of the notice.

All applicants have had the opportunity to review our customer Fair Processing Notice on our website.

I can confirm that the applicant(s) have been notified

Yes No

Credit search results to be used only for Together application

I and my firm will ensure that results of this credit search that are received by me or my firm are only used (by me, my firm or any third party) in connection with application for a loan (or increased loan) from Together Commercial Finance Limited, Together Personal Finance Limited and/or another company within the Together Group.

I acknowledge that I am only permitted to proceed with this credit search if I agree with the above, which by checking "Yes" below, I do.

Yes No

Continue →

Make sure you have your client's permission to run a credit search

Credit profile

Applicant details | Credit profile | Demerit summary

Important Completing a search will update the selected product to reflect any new demerit information.

- The data has changed since your last search. Please make a new Equifax search.

Applicant details

Title: Mr | Date of Birth: 01/01/1995

Name: Bob | Middle name: | Surname: Smith

Address - quick entry

House No.: 10 | House Name: | Postcode: SW1A 2AA

Credit search →

Summary

Total demerits (in last 12 months): 0 in 12

Qualifying defaults: 0 in 12

Qualifying ccjs: 0 in 12

Secured debt

Total secured balance: £0.00

Last 6 months

Accounts opened: 0

Credit searches: 0

Credit profile request history

Created	Time	Report	Lender	Expiry

At this stage, we'll run a credit report which is a 'soft search'



Applicant details | Credit profile

Important Completing a search will update the applicant's credit profile.

Applicant details

Title: Mr

Name: John

Address - quick entry

House No.: 6

Applicant: John Smith

Addresses - multiple matches

6 Raven Road Altrincham

6, RAVEN ROAD, ALTRINCHAM, [REDACTED]

Generate report >

in last 12 months) 0
0 in 12
0 in 12

£0.00

Last 6 months

Accounts opened 0
Credit searches 0

Credit profile request history

Created
Time
Report
Lender
Expiry

Click and highlight **ALL** of your client's address before generating the report.



Applicant Income | Credit Commitments | Monthly Household Expenditure | Summary

Credit history

In the last 2 years, has the applicant been 3 months in arrears on any Mortgage/Loan?

In the last 3 years, has the applicant been subject to a CCJ with the total value greater than £500?

In the last 3 years, has the applicant been subject to an IVA or bankruptcy order?

Total mortgages and loans secured against security address

Company name/ Creditor	Payment type	Mortgage type ⓘ	Original term (mnths)	Start date (DD/MM/YYYY)	Arrears	Balance (approx)	Monthly payment	To be repaid
Add new mortgage or loan +								
					Arrears	Balance (approx)	Monthly payment	
Total mortgages/loans secured against security					£0	£0	£0	
Total to be repaid					£0	£0		
Total remaining						£0	£0	

Credit Unsuccessful CCJS/ Defaults/ Bankruptcies and IVAs

ⓘ IMPORTANT NOTE: Minimum repayment amounts may be applied to certain items to calculate the MAMR, therefore it is important to verify with the applicant the repayment amount being made to all credit types and amended accordingly.

Company name/ Creditor	Applicant	Type	Balance (approx)	Monthly payment	To be repaid
Halifax	Kara Williams	Credit Card	£ 1500	£ 50	No
Add new Credit/ Unsuccessful CCJS/ Defaults/ Bankruptcies and IVAs +					

Here you'll find the **results** of your client's credit search.

Indicate with this dropdown menu if the loans will be repaid with proceeds of the new Together loan.



Affordability outcome

Please complete all areas of affordability by progressing through the screens using the 'Next' button below.
The affordability outcome will be displayed on the final screen.

Payments

Monthly Payment	£1347.22/pm
Stressed Monthly Payment	£1,453.93/pm
✔ Credit impaired?	No

- Applicant Income
- Credit Commitments
- Monthly Household Expenditure
- Summary

Miss Kara Williams

Validate income ⓘ

In order to take advantage of income validation you will need to complete a credit search first

Employed income

Payment period types
Monthly

Total Net Monthly Income (All net period fields must be completed for employed applicants as they are used to calculate an average value)

Month 1 ⓘ

£ Net period 1
0

Month 2

£ Net period 2
0

£ Net period 3
0

Is this a zero hours contract?

£ Zero hours contract
No

Year to date

£ Gross income
0

Number of periods(year-to-date)
0

£ Tax
0

£ Nat ins
0

£ Pension
0

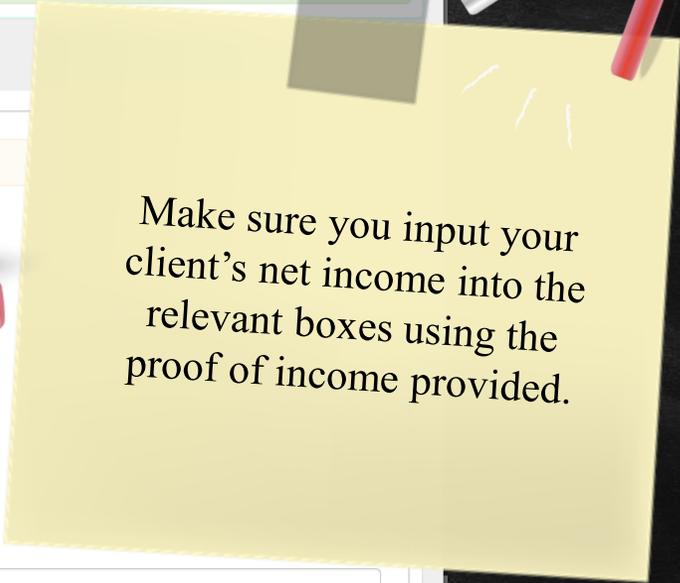
£ Other deductions
0

Rental income

£ Total Gross Monthly Rental Income
0

Total annual taxable income

£ Total Annual Taxable Income including rental
0





Automated affordability outcome

Fail

The application does not pass on our Automated Affordability Assessment. In order to proceed, you will need to opt in to providing Customer Stated Expenditure items below.

Lending into retirement

One or more applicants retire during the term of the loan. After completion of the Full Affordability Assessment you will need to complete the Retirement Affordability Assessment tile (LIR). For more information please refer to our guidance notes

If the term exceeds 114 months you will be required to provide additional evidence of income and affordability in retirement. For more information please refer to our guidance notes.

Payments

Monthly Payment	£1347.22/pm
Stressed Monthly Payment	£1,453.93/pm

Credit impaired? **No**

Credit Commitments | Monthly Household Expenditure | **Summary**

Additional details

dependents aged 19 or above

dependents aged 18 or below

Additional expenditure items below that the applicant(s) are committed to:

<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>	

IMPORTANT INFORMATION

On pressing calculate we will assess the applicant(s) affordability against our automated expenditure model. If the outcome of this assessment passes, we will not require you to provide us customer stated expenditure.

If the outcome is a fail, you will have to 'opt-in' to providing customer stated expenditure by using the 'Use Stated Expenditure' button on this screen.

Next, the system will perform an automated affordability check. Should this **fail**, you have the option to re-run with your client's stated expenditure.

All stated expenditure must be evidenced.

Note: if committing to 'stated expenditure' you can't revert to a different affordability assessment

Go to [Chalk](#) to download and read 'MyBrokerVenue – Affordability Assessment' for extra help



Maximum affordable monthly repayment

£2,287/pm

Customer stated affordability outcome

Pass

The application has passed our affordability assessment based on the data you have provided.

Lending into retirement

One or more applicants retire during the term of the loan. After completion of the Full Affordability Assessment you will need to complete the Retirement Affordability Assessment tile (LIR). For more information please refer to our guidance notes

If the term exceeds 114 months you will be required to provide additional evidence of income and affordability in retirement. For more information please refer to our guidance notes.

Payments

Monthly Payment	£1347.22/pm
Stressed Monthly Payment	£1,453.93/pm

Credit impaired? No

Applicant Income | Credit Commitments | Monthly Household Expenditure | **Summary**

Basic household details

Number and Ages of dependents aged 19 or above
0

Number and Ages of dependents aged 18 or below
0

Number of Cars
0

Basic household expenditure

	Stated	Expected min
Shopping (including clothing) ⓘ	£ 200	£ 240
Gas, Electric, Heating Fuels	£ 50	£ 33
Water	£ 40	£ 32
Car Expenses ⓘ	£ 0	£ 0
Other Travel ⓘ	£ 0	£ 29

This shows how much your client can **afford** on a monthly basis.

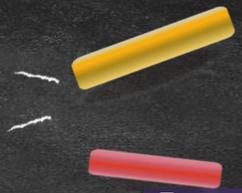
Be sure to complete your client's **stated expenditure** section based on their **actual** expenditure.





Packaging and uploading cases





Checklist

i In order to submit this application, You'll need to provide all the items below. You will need to upload each item individually.

i Please ensure documents are correctly uploaded against the correct items listed. Uploading the same document multiple times, or bulk uploading against individual items will cause delays to this application. At this stage you only need to upload the documents listed below.

Note: We can only accept files in .pdf, .doc, .docx, .jpg, .jpeg, .png, .tif, .tiff and .bmp formats, with a maximum file size of 100MB.

Submission Checklist

Checklist Item	Submission Method	Document(s)
Direct Debit Mandate	Upload	Browse
Estate Agent sales particulars	Upload	Browse
Applicant Declarations form	Upload	Browse
Full or Realtime Valuation. Please see our current criteria for our Valuation by-pass scheme	Upload	Browse
Printed Affordability Assessment Form signed by the applicant(s)	Upload	Browse
Proof of Name - Miss Kara Williams	Upload	Browse
Proof of Address - Miss Kara Williams	Upload	Browse
Proof Of income - 3 Payslips within the last 5 months - Miss Kara Williams	Upload	Browse

If one of our team have requested that you provide additional checklist items or you have a document unique to this application that you think we'll need,

Enter checklist name... [+ Add Other](#)

Select 'Browse',
Check boxes' and
'Produce docs'

Documents

Generate documents

Produce docs Select all docs
 Blank documents

Trading Style ▼

- Accountants Reference
- Applicant Declarations Form
- Confirmation of Ground Rent and Service Charge Arrears
- Direct Debit Mandate
- Electronic Disbursement Authority
- Employers Confirmation
- Gifted Deposit Letter
- HMLR Change of Name Authority
- Mortgage Illustration
- Mortgage Reference - BSQ
- Occupiers Consent Solicitor to Witness Certificate
- Out of Plan Assistance Form
- Referral Information form
- Regulated Bridging Enquiry form
- Regulated Bridging Submission checklist
- Rent Reference
- Submission Checklist
- Submission Cover Sheet

Make sure your client
has completed all
documents **BEFORE**
you upload them.
Then hit submit



Alternative plans available:

- 8.1% Two Years Fixed Term Loan (FCA Regulated) FIR101_F24_PP
- 7.74% Five Years Fixed Term Loan (FCA Regulated) FIR101_F60_PP
- 8.85% Two Year Discounted Rate Residential Mortgage (FCA Regulated) FIR101_D24_PP

Applicant Details ⚠️ Credit Profile Security ✔️ Affordability LIR Application Data ✔️

Documents Submission Checklist ⚠️ Validate Save & Close

Do all your boxes – with the exception of affordability and LIR – have a green tick?

Once they're all green, press 'Validate' to submit.



Checking progress





Checking progress

Note: This application has been successfully submitted.

Case Summary

Submission Ref: [REDACTED]

Product: Buy-To-Let Loan (Unregulated) Repayment type: Capital Repayment Loan amount: £35,000.00
Plan: BTL101_F60_PP_RE Loan term: 120 months Product type: Fixed 5 Yrs
Repayments: 60 instalments of £483.44 followed by 59 instalments of £510.15 with a final payment of £805.15 Property value: £117,000.00 Rate: 7.84%
LTV: 32.95% Commission: £437.00

My Outstanding Items > Documents >

Email Updates

Case Tracking



Key Events Completed

✓ Funds requested 27/09/2024 16:08	✓ Outstanding items verified 27/09/2024 14:46	✓ [REDACTED] Security Call ◦ Call completed 27/09/2024 14:46
✓ Income approved 27/09/2024 13:57	✓ Credit search approved 27/09/2024 13:57	✓ Valuation approved 27/09/2024 13:49
✓ Virus check 27/09/2024 10:49	✓ Documents received 27/09/2024 10:49	

SLA's

Switch to Application view

You can check progress on this dashboard. For new business your case will be processed within 48H. Expect to hear from an underwriter in 72H

Chalk Talk

Don't forget to view our videos on our [Chalk Talk page](#) where you'll find a further explanation on the above.

Get in touch!

Please contact
our team on
0161 933 7101
for further support.

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together.