

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.

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

* If the applicant(s) lives abroad (outside of the UK), in the 'Current Address' section, the country of residence can be inputted as 'Non-UK', removing the credit search requirement.

What happens after you've referred an application?

- 1 Once the referral has been submitted, we will review this.
- 2 Once we've reviewed the referral, you'll receive an email confirming this has been reviewed and a decision has been made.
- 3 Log back into My Broker Venue.
- 4 Open the referral form back up and our response will be in the 'Underwriter comments' section on the right hand side.
- 5 If you want to respond, or send further information, follow the above referral process again.