

PREPARATION SERIES

Application *preparation guide.*

A cross-product guide to preparing a useful first enquiry.

03

PREPARATION AREAS

11

PRACTICAL POINTS

Secure

DOCUMENT ROUTE

01

Explain the need clearly

5 POINTS TO PREPARE

- ☐ What are you funding?
- ☐ How much is needed?
- ☐ When is it needed?
- ☐ How will it be repaid?
- ☐ What evidence already exists?

02

Avoid weak enquiries

3 POINTS TO PREPARE

- ☐ Don't hide disputes or unclear repayment routes.
- ☐ Don't send sensitive documents to unverified email addresses.
- ☐ Don't assume a headline rate matters more than structure and exit.

03

Use the right route

3 POINTS TO PREPARE

- ☐ Invoice-led: prepare ledger and debtor evidence.
- ☐ Property-led: prepare security and exit evidence.
- ☐ Supplier-led: prepare supplier, buyer and margin evidence.

Send documents securely. Use the confirmed secure Cashbook route for sensitive documents. Don't send identity documents or bank information to an unverified email address.

Start with a direct conversation

No obligation either way: cashbookfinance.co.uk/apply

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