

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

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

5 POINTS TO PREPARE

02

Avoid weak enquiries

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

3 POINTS TO PREPARE

03

Use the right route

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

3 POINTS TO PREPARE



Use the confirmed secure Cashbook route for sensitive documents.

Do not send identity documents or bank information to an unverified email address.

Start with a direct conversation - no obligation either way.

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