

PREPARATION SERIES

Bridging finance *preparation checklist.*

Use this before discussing a property-backed short-term facility.

03

PREPARATION AREAS

13

PRACTICAL POINTS

Secure

DOCUMENT ROUTE

01

Before you contact us

4 POINTS TO PREPARE

- ☐ Know the funding amount or range you want to discuss.
- ☐ Explain what the cash is needed for, in one or two sentences.
- ☐ Know your deadline and whether it is flexible.
- ☐ Keep company, director and contact details ready.

02

Property and security

5 POINTS TO PREPARE

- ☐ Property address and type.
- ☐ Estimated market value and how it was reached.
- ☐ Purchase price, refinance balance or required loan amount.
- ☐ Existing charges or secured lenders.
- ☐ Solicitor or agent details, if available.

03

Exit and deadline

4 POINTS TO PREPARE

- ☐ Target completion or refinance date.
- ☐ Planned sale, refinance or other repayment route.
- ☐ Evidence supporting the exit route.
- ☐ Known title, valuation or planning issues.

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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