

## PREPARATION SERIES

# Property exit-route *checklist.*

Use this where repayment depends on a sale, refinance or another defined exit.

03

PREPARATION AREAS

9

PRACTICAL POINTS

Secure

DOCUMENT ROUTE

01

## Sale exit

3 POINTS TO PREPARE

- ☐ Agent appraisal or marketing evidence.
- ☐ Expected sale price and a realistic timescale.
- ☐ Any conditions needed before sale.

02

## Refinance exit

3 POINTS TO PREPARE

- ☐ Target lender or product type.
- ☐ Income, valuation or lease evidence required for refinance.
- ☐ Known affordability or documentation issues.

03

## Risk controls

3 POINTS TO PREPARE

- ☐ A fallback exit if the first route slips.
- ☐ Allowance for valuation or cost movement.
- ☐ Legal issues that could slow completion.

**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

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