

# Key Sourcing Facts – Retirement Lending

Use to summarise key sourcing facts.  
NOT a replacement for fact-find.

Client Name/s:

Postcode:

Age/s:

Property Value:

1: Loan required

Initial Sum

2: Drawdown Facility Required?

Yes

No

Drawdown

3: Any health conditions which could increase LTV or reduce interest rate?

(Detail in fact-find)

Yes

No

4: Client able to service loan? (Enter budget below)

Yes

No

5: Is there a requirement to protect equity in property?

(Detail in fact-find)

Yes

No

6: Does client have a preference for product type? If so, which and why?

7: Most Suitable Product Category you recommend

Roll Up

Voluntary Payment

Interest Serviced

Capital & Interest

Home Reversion

Other, please state:

8: Future Plans i.e. House move, known future capital maturities, commitments etc.

9: Likelihood of early repayment?

Definitely

Very likely

Possible

No plans to repay

10: Facts that may affect lending criteria i.e. Property type, credit history etc

**Additional Notes:**