

PRIVATE & CONFIDENTIAL

Name:

Our Ref:

Company:

Date:

Address:

Address:

Post Code:

Dear,

Re: Accountants Reference Request

Mortgage Application No:

Applicant:

Your client named above has authorised the Society to approach you for a reference. Please answer the following questions on your own letter-headed paper and return to us. All information will be treated in confidence. If you make a charge for this Service, please contact your client for payment as the Society will not meet the cost.

1. Nature of business?
2. How long has your client been trading in this capacity?
3. Is the business a limited company/partnership/sole trader?
4. If a limited company, registration number?
5. What is the applicant's percentage shareholding?
6. If sole trader/partnership, please confirm (applicant's share only) the net profit before tax for their last 3 trading years stating year ended for each figure.
7. If limited company, please confirm applicant's gross income from salary and/or dividends for the last 3 trading years stating year ended for each figure.
8. Details of income from other sources (if known)
9. If you have any reason to expect the income figure to be lower in the current financial year, please indicate what the figure may be.
10. Please state your qualifications.
11. Please provide the last 3 years trading accounts (required/not required).

If you have any queries, please do not hesitate to contact me at this office.

Yours sincerely

Name:

Company: