



### Commercial Fact Find

Client:

Reference:

Where do you currently hold your Business Accounts?

How much are you currently borrowing? When did you take the loan out? Is it a Fixed or Variable rate? (If so what are the Rates)

Are you happy with the price you pay for Borrowing? When did you last review this?

What plans do you have for your Business this year? Next year?

Are you looking to buy any property?

Do you rent your premises? Would like to buy them? Have you considered using your Pension to help buy a Commercial property (SIPP changes April 2006)?

Are you looking to purchase any assets (vans, plant/machinery etc)?

Are you looking to expand your turnover? Or take on any new clients? (How will you fund the expansion)?

How happy are you with the Service you receive?

Are you happy with the Flexibility your Bank provides?

**From what you have told me I would strongly recommend that you meet with David Napier, Business Consultant, to see if he can help you improve the Banking deal you have?**

**Is there any reason why I could not get David to telephone or come out and see you?**

