

Client Proposal Form.

Business & Personal Insolvency Cover Plans.

The information requested below is in connection with the preparations required to form a Business or Personal Insolvency Cover Plan. All details should be completed as fully as possible, in order that the correct information is obtained. If you require to add any additional information this can be done using the continuation section at the end of this application. (See Box 7) If you require any assistance with this application then please e-mail your query to: helpdesk@westcorp-uk.com.



**PROMOTING
BUSINESS
AWARENESS**

Return to : WestCorp. Central Admin: POB 10035. 9 Church Street Glasgow. G71 7YY.

(1) Client Details.

Surname :	<input type="text"/>	Forename(s) :	<input type="text"/>	Title :	<input type="text"/>
Address :	<input type="text"/>	Tel No. (Day) :	<input type="text"/>		
<input type="text"/>		Tel No. (Eve) :	<input type="text"/>		
<input type="text"/>		Postcode :	<input type="text"/>		

(2) Business Details. Trading Style : Plc Ltd Sole Trader Partnership Other

Business Name :	<input type="text"/>	Tel No. (Day) :	<input type="text"/>		
Business Address :	<input type="text"/>	Fax No. :	<input type="text"/>		
<input type="text"/>		Postcode :	<input type="text"/>		
Turnover £	<input type="text"/>	No. Of Employees	<input type="text"/>	Years In Business	<input type="text"/>
Last Accounts to	<input type="text"/>				

Principal (Directors/Proprietors) Business Classification :

(1)	(2)	(3)	(4)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

(3) Professional Services. (Principal Banker/Accountants/Solicitors/Financial Advisors)

(a) Banker	(b) Accountants	(c) Solicitor	(b) Financial Advisors
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postcode	Postcode	Postcode	Postcode

(4) Creditor Position.(Amounts Owed) : (Loans/HP/Leasing/Other)

Main Creditors :	£ Amount	Description	Given Security	Type Of Security
(a) Bank			YES / NO	
(b) Finance House			YES / NO	
(c) Building Society			YES / NO	
(d) Other Lender			YES / NO	
(e) Investors			YES / NO	
Other Creditors :				
(f) VAT			YES / NO	
(g) IR/TAX			YES / NO	
(h) Rates			YES / NO	
(i) Other			YES / NO	

(5) Debtor Position.(Investments Into Business/Monies Debts Owed to the Business)

(a) Personal Investments	(£)	Details	
(b) Other Capital Investments	(£)	Details	
(c) External Debtors	(£)	Details	

(6) Business/Personal Assets.(Heritable Property with an element of FREE Equity) These properties must not have been fully pledged to any other source and are available in part to be utilised in security to your Business Protection Plan.

(a)				
Property 1 :		Mortgage Holder :		
Amount Outstanding £		Value £		Monthly Payment £
Property 2 :		Mortgage Holder :		
Amount Outstanding £		Value £		Monthly Payment £
Property 3 :		Mortgage Holder :		
Amount Outstanding £		Value £		Monthly Payment £

(b) Business Assets (Plant, Equipment, Stock, Fixtures & Fittings - All Business Assets of Value)

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20

(c) Personal Assets (Boats, Cars, Jewellery, White Goods, Furnishings - All Personal Assets of Value)

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20