COMMERCIAL FINANCE LAUNCH PROGRAMME · SOURCE AND PACKAGE THE DEAL TO A LENDER

Deal packaging template

A lender-ready cover pack: deal summary, key financials, security, and the deal narrative.

01 The deal summary

The first page a lender reads. Make it do the work.

The client, the amount, the purpose, and the term

Why this business, why this amount, why now

02 The evidence

The key financials attached and referenced

The security and how it supports the deal

03 The narrative and the lender

The story of the deal in a short, honest paragraph

Best-fit lender or lenders chosen, with the rationale evidenced

PREFER THIS DONE FOR YOU?

Want a portal that keeps your deal packs and documents in one place?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

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