

A clearer lender conversation

FILLABLE SCORECARD | Fictional Harborview case | 25 October 2026

Review the brief and source files, then choose one rating per item. This is feedback on preparation quality, not an underwriting decision or lender endorsement. Use the PDF viewer's Save function to keep your answers.

Reviewer (optional)

Institution (optional)

1. The borrower, financing purpose, amount and use of funds are clear.

Not reviewed

Example / note

2. Annual and interim periods, business repayment and household support stay separate.

Not reviewed

Example / note

3. Important figures can be traced to their source document and location.

Not reviewed

Example / note

4. Conflicts, missing tax-return evidence and uncertain image transcription are visible.

Not reviewed

Example / note

5. Planning payments, assumptions and unresolved debt structure are explained.

Not reviewed

Example / note

6. The outstanding-item list identifies what you would request next.

Not reviewed

Example / note

What is the single most important missing item?

Would this save preparation time?

Not reviewed

What would still need rework?