

Section 1. Personal details

Applicant 1

Title

Full name

Current residential address & postcode

Date moved in

Date of birth Sex

Telephone No.

Email address

Relationship to second applicant

Marital status

Nationality

UK resident?

Length of UK residency - Years Months

Are you on the electoral role?

Do you have a clean credit record? Use notes

Applicant 2

Title

Full name

Current residential address & postcode

Date moved in

Date of birth Sex

Telephone No.

Email address

Relationship to first applicant

Marital status

Nationality

UK resident?

Length of UK residency - Years Months

Are you on the electoral role?

Do you have a clean credit record? Use notes

Section 2. Financials

Total monthly income – all sources

Total monthly expenditure – all sources

Total net monthly income after tax

Total value of all assets in your name

Total value of all liabilities in your name

Total net individual worth

Total monthly income – all sources

Total monthly expenditure – all sources

Total net monthly income after tax

Total value of all assets in your name

Total value of all liabilities in your name

Total net individual worth

Section 3. Employment

Employment status

Full time Part time

Occupation (job title)

Employer/business name

Business type/industry

Date employment commenced

Are you a shareholder – if yes, percentage held

Company registration no. (if applicable)

National ins. no. Planned retirement age

If you have any additional employment please provide details below

Employment status

Full time Part time

Occupation (job title)

Employer/business name

Business type/industry

Date employment commenced

Are you a shareholder – if yes, percentage held

Company registration no. (if applicable)

National ins. no. Planned retirement age

If you have any additional employment please provide details below

Section 4. The loan

Value of the property	<input type="text"/>	Deposit & other funds available	<input type="text"/>
Purchase price (if lower)	<input type="text"/>	Source of own funds	<input type="text"/>
Existing loan/s to be repaid	<input type="text"/>	Repayment preference	<input type="text"/>
New loan required	<input type="text"/>	If part interest only, amount required on interest only	<input type="text"/>
Term of loan required	<input type="text"/>	Your rate preference	<input type="text"/>
		For how long	<input type="text"/>

Remortgages & further borrowing

Have you approached your existing lender Please use notes section to inform us of the outcome or, reasons they have declined to lend

Who is named on this mortgage

If borrowing additional funds, state amount required And the purpose

Name of current lender The date you purchased the property

Current loan account no. The date the mortgage commenced

Term left on the loan redemption penalty payable Penalty end date

Section 5. The property (being used as security for the new loan)

Residential only Commercial only Mixed use HMO Multi-unit freehold other

Full address & postcode When was the property built

Ownership title

If leasehold how many years remain in the lease Who will own the freehold

No. of. Bedrooms Bathrooms Kitchens Living rooms Other

How many bedrooms/apartments are currently occupied How much are you expecting in rent pm

How many apartments/flats are self-contained How many share facilities Do all rooms meet legal requirements

How many flats in the block How many storeys in the building On which floor is the property located

What type of tenancy/lease agreement will you have in place

If the property has been converted, state what it was previously and when the conversion took place

Use the space below to describe the construction and any other features of the building e.g. Grade II listed, lift access, deck access, limited access, cladding, above retail units or food outlets, bars or night clubs and any other non-standard features.

Section 6. Additional security 1st & 2nd charge (cross collateral applications)

Current value	<input type="text"/>	Original term	<input type="text"/>	Full address & postcode <input type="text"/>
Current loan/s	<input type="text"/>	Term remaining	<input type="text"/>	
Monthly cost	<input type="text"/>	Redemption penalty	<input type="text"/>	
Interest rate	<input type="text"/>	Penalty end date	<input type="text"/>	
Describe Property type	<input type="text"/>		Year built	

Section 7. Ltd Co./LLP applications

Company/Partnership name <input style="width:95%" type="text"/>	Co. registration no. <input style="width:95%" type="text"/>
Registered office address <input style="width:95%" type="text"/>	Registered trading address <input style="width:95%" type="text"/>

Nature of business (SIC)

	Name	Position	%	Nationality	UK resident
Director/shareholder 1	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input type="checkbox"/>
Director/shareholder 2	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input type="checkbox"/>
Director/shareholder 3	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input type="checkbox"/>
Director/shareholder 4	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input style="width:95%" type="text"/>	<input type="checkbox"/>

Section 8. Professional advisers

Solicitor/legal representative	Accountant/qualified tax adviser
Solicitor name <input style="width:95%" type="text"/>	Accountant name <input style="width:95%" type="text"/>
Name of firm <input style="width:95%" type="text"/>	Name of firm <input style="width:95%" type="text"/>
Address & postcode <input style="width:95%" type="text"/>	Address & postcode <input style="width:95%" type="text"/>
Telephone no. <input style="width:95%" type="text"/>	Telephone no. <input style="width:95%" type="text"/>
Email address <input style="width:95%" type="text"/>	Email address <input style="width:95%" type="text"/>

Section 9. Eligibility & preferences

Is this your first but to let or investment property?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you currently own your main residence?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is this your first mortgage application?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you currently own other UK buy to let or investment property?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you own 4 or more buy to let properties in UK in your name or any other business you are connected to?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you and/or any family member lived in or intend to live in any property connected with this application?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you taken professional tax advice before setting up any limited company structure?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you ever been refused credit or had any application for any mortgage or loan declined?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Have you approached any other lenders or brokers in connection with this application	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Would you like any lender arrangement fees added to the loan?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Tell us about your attitude to risk <input style="width:95%" type="text"/>	How will you repay this loan <input style="width:95%" type="text"/>	

Important information

The purpose of this document is to help us understand your needs. Our assessment and any terms or quotes issued will be based solely on the information provided in this form. Loans will not be granted on this data alone and you may need to provide further information and evidence to support all the data you have given us should you wish to apply for any mortgage or loan. Any rates offered are not guaranteed, may only be valid on the day they were issued as lenders may change rates, criteria, terms and conditions at any time. We cannot offer any guarantees you will be able to obtain any mortgage or loan based on the information provided in this form and we cannot be held responsible for any decision made by any lender. All regulated firms will carry out their own background checks on the validity of the information you provide to us and any suspicious activity will be reported to the appropriate authorities

Declaration

I/we confirm that the information provided in this document is true, accurate and can be evidenced if required

Applicant 1	Applicant 2
Full name <input style="width:95%" type="text"/>	Full name <input style="width:95%" type="text"/>
Date <input style="width:95%" type="text"/>	Date <input style="width:95%" type="text"/>

Section 10. Notes

Empty area for notes.