

Before you complete this form for the applicant, please make sure they have seen 'How Nationwide uses your information' by visiting nationwide.co.uk/privacy, and they have understood how their information will be used.

Additional Borrowing Application Form

For intermediary business

If your application is to request a Decision in Principle only, you need to complete sections 1 to 11, 13 and 14 only.

If your application is to request a Full Mortgage Application, please complete all sections.

Need a copy of documents in Braille, large print or audio format?
Just ask in branch or call **03457 30 20 11**.

Mortgage application supporting documentation checklist

If you have previously been provided with a Decision in Principle for this mortgage, please enclose the evidence requested with this mortgage application.

Otherwise, please provide the following information listed below, failure to supply this evidence **will result in the application being returned upon receipt**.

Reason for submission

Reason For Paper Application

(Reason for submitting a paper application must be complete)

Technical issue that has resulted in the case having to be submitted via paper ☐

Ticket number (must be supplied)

Identification

Evidence We Can Accept

Name

Please supply one document from the UK Photo ID list below:

- Valid passport ☐
- Valid UK or Northern Ireland full photo card driving licence ☐

If you don't have either of the above, please supply one document from the proof of name list below and one **different** document from the proof of current address list.

- UK based bank, building society or credit card statement (less than 3 months old, internet banking statements/ Nationwide Flex Account statements/Cheshire, Derbyshire and Dunfermline building societies statements are not acceptable) ☐
- HM Revenue and Customs notice of tax coding (less than 12 months old) ☐
- Benefit letter less than 12 months old and from Government organisation only ☐
- Valid UK or Northern Ireland old style paper or photocard full/provisional driving licence ☐
- Valid National ID cards issued by European Union member states ☐

Address

Acceptable proofs of current address:

- Mortgage statement (less than 12 months old excluding Nationwide, Cheshire, Derbyshire and Dunfermline building societies) ☐
- UK based bank, building society or credit card statement (complete full month required, less than 3 months old, internet banking statements/ Nationwide Flex Account statements/Cheshire, Derbyshire and Dunfermline building societies statements are not acceptable). ☐
- Valid UK or Northern Ireland old style paper or photocard full/provisional driving licence. ☐
- HMRC notice of tax coding (less than 12 months old) ☐
- Gas, electricity or telephone bill, not mobile (less than 3 months old, internet statements are not acceptable) ☐
- Any benefit letter from a government organisation (less than 12 months old) ☐
- Local authority housing benefit letter (less than 12 months old) ☐

Acceptable proofs of UK Residency for non UK/Republic of Ireland (ROI) nationals

Evidence We Can Accept

Please provide the following documents:

- Copy of a valid passport ☐
- Passport containing stamp for indefinite leave to remain/non indefinite leave to remain in the UK or ☐
- Copy of visa/residency permit (front and back for new biometric formats) or ☐
- Copy of 'Check someone's immigration status' document confirming settled or pre settled status ☐

One additional acceptable proof of current address as detailed in the section above.

Please also complete the information in section 17.

For further information on acceptable proofs to UK Residency, please visit nationwide-intermediary.co.uk

Income - Permanent employment proofs

Evidence We Can Accept

Non-variable basic salary	Please provide: The most recent payslip. It must be the full payslip, including any detachable parts. Please view the payslip example on the website for further information.	☐
Variable basic salary	(If the applicant does not receive the same basic salary and there is no annualised figure on the current payslip) Use the below bonus, overtime & commission section to work out the number of payslips required based on the frequency of the salary. Please provide: The most recent payslip. Where the applicant wishes to declare any of the following please circle which ones they wish to include. Car allowance/Location allowance/Mortgage subsidies/Shift allowance/Teaching & responsibility payment (TLR) 1 & 2/ Value account/Pension benefit fund.	☐
Bonus, overtime & commission	Based on the frequency, please provide: Paid weekly - last 8 consecutive payslips Paid fortnightly - last 6 consecutive fortnightly payslips Paid 4 weekly or monthly - last 3 consecutive payslips Paid quarterly bonus & commission - last 3 consecutive quarterly payslips or award letters/statements from the current employer that show payment (the oldest cannot be more than 12 months old) Paid half yearly bonus & commission - last 4 consecutive half yearly payslips or award letters/statements from the current employer showing payment (the oldest cannot be more than 25 months old and both must show receipt of a bonus or commission) Annual bonus & commission - last 2 consecutive annual payslips or award letters/statements from the current employer showing payment (the oldest cannot be more than 25 months old and both must show receipt of a bonus or commission)	☐ ☐ ☐ ☐ ☐ ☐ ☐

Income - Self-employment proofs

Evidence We Can Accept

For applicants with an accountant	Please provide: Accountant's name, address, contact telephone number and email address We will then request an accountant's certificate directly from the accountant.	☐
For applicants who self-assess and submit their tax returns online to HMRC	Please provide: The latest two years' tax calculations accompanied by corresponding HMRC tax year overviews.	☐
For your applicants who self-assess and submit paper based tax returns to HMRC	Please provide: The latest two years' tax calculations (HMRC will automatically send a paper copy of the tax calculation to your applicant after the tax return has been processed by HMRC) accompanied by corresponding HMRC tax year overviews.	☐

Other income

Evidence We Can Accept

Tax Credits (Working & Child Tax Credit) Universal Credit Employment Support Allowance Widowed Parents Allowance	For any of these, please provide: Latest 3 months' bank statements	☐
Maintenance	Please provide: Latest 3 months' bank statements showing last 3 months' payments	☐

Benefits specifically for the disabled	The below benefits paid because of a disability are an acceptable source of income, provided the applicant can provide their current award letter: Please circle which are applicable Incapacity benefit/Disability living allowance (DLA)/Reduced earning allowance (REA)/Attendance allowance/Personal independence payment (PIP)/Industrial injuries disablement benefit/Armed forces compensation scheme/Disability living allowance on behalf of a child under 16, Carers/Attendance allowance, Armed forces independence payment Some of the information you give us might be sensitive (for example, if it's about health-related matters). We call this 'special category data'. We'll assume you're happy for us to make a note of this, and would like to reassure you that we'll only use it to help us with your application. If you'd like to find out more, please see 'How Nationwide uses your information' at nationwide.co.uk/privacy or in branch.	
State retirement pension	Please provide: Latest annual statement of pension	☐
Private/Company/ Occupational pension	Please supply one of the following: Latest annual statement of pension/due on retirement Latest payslip from the pension provider Latest letter from the pension provider Latest P60 from the pension provider	☐ ☐ ☐ ☐
War Disablement/ War Widow(ers) pension	Please provide: Latest award notice	☐

Bank Statement

Evidence We Can Accept

UK based bank/building society statement	Please provide: Latest one full month salary fed statement	☐
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For more detail on policies and evidence requirements please visit nationwide-intermediary.co.uk

We may require more evidence once the case has been received and assessed. If this is the case we will contact you with what is needed.

Intermediary use only

- To improve service, this form and associated documents may be electronically imaged
- To make this process efficient, please complete all sections in full, including the checklist
- Any proofs submitted must be photocopies

DIP completed

☐

DIP reference number:

Please complete this Application Form in block capitals and remember to complete the reference authority and Direct Debit Instruction (if applicable) at the end.

Charges

Do you intend to pass any of the procurement fee to the applicant(s)?

Yes ☐

No ☐

If Yes, how much? £

Are you charging the applicant(s) any other fees **excluding** Nationwide fees/charges?

Yes ☐

No ☐

If Yes, please complete below (tick all that are applicable)

Type of fee/charge

Amount

To whom payable

Advice

☐

£

Arrangement

☐

£

Administration

☐

£

Valuation

☐

£

Other

☐

£

For each fee that is charged, please tick one box to indicate when the fee is payable

On application

Before mortgage starts

On completion of mortgage

Immediately

Advice

☐☐☐☐

Arrangement

☐☐☐☐

Administration

☐☐☐☐

Valuation

☐☐☐☐

Other

☐☐☐☐

Are any of these fees refundable (tick either 'Yes' or 'No' box for each fee/charge)? For each fee that is refundable, please tick one box to indicate when refund is payable

Yes No

If Yes, amount

If application doesn't proceed

When the offer is issued

When the loan starts

Following completion

On redemption

Advice

☐☐

£

☐☐☐☐☐

Arrangement

☐☐

£

☐☐☐☐☐

Administration

☐☐

£

☐☐☐☐☐

Valuation

☐☐

£

☐☐☐☐☐

Other

☐☐

£

☐☐☐☐☐

Company name and address

Company name

Property number and/or name

Street

Town

Postcode

Should we need to make contact in relation to this case (enter packaging/admin centre number if applicable)

Telephone number (inc STD)

Network / Mortgage Club / Company / Branch Agency

To ensure this application is processed under the correct route please state the name of the Network/Mortgage Club/Company/Branch Agency Principal that you wish this application to be processed under

[illegible]

Please affix appropriate sticker here

Intermediary/agent code

Name of usual mortgage centre or branch

For Mortgage Application Tracking Service (MATS)

Mobile telephone number

Email address

Declaration

I confirm that all documents provided, whether electronically attached or posted, are genuine copies or photographic images of the original documents that have been seen by me and (where appropriate) my client(s) have authorised me to take and provide you with photographic images of the documents provided.

Intermediary's name

Company FCA number If you are an Appointed Representative this is not your Principal's FCA name or number

Level of advice (please confirm) Advised ☐

Signature

Please sign within white box

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Date

D D M M Y Y Y Y

Nationwide reserves the right to return this case if the correct fees are not included, signatures are missing, and/or the application is not fully completed.

1. Personal information

	First Applicant	Second Applicant
Title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other	Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other
Please enter ALL forenames		
Surname		
Date of birth	Gender (please tick) ☐ M ☐ F	Gender (please tick) ☐ M ☐ F
Previous title	Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other	Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other
Forename		
Surname		
Date and method of change		
Marital status	Deed Poll ☐ Marriage/Civil partnership* ☐ Divorce/Dissolved civil partnership* ☐ Single ☐ Engaged ☐ Married/Civil partnership* ☐ Separated ☐ Divorced/Dissolved civil partnership* ☐ Widowed ☐	Deed Poll ☐ Marriage/Civil partnership* ☐ Divorce/Dissolved civil partnership* ☐ Single ☐ Engaged ☐ Married/Civil partnership* ☐ Separated ☐ Divorced/Dissolved civil partnership* ☐ Widowed ☐
* Civil partnerships are couples registered under the Civil Partnership Act 2004		
Dependant Details How many financial dependants do you have in the following age groups?	First Applicant Under 6 years 6 to 11 years 12 to 17 years 18 years and above	Second Applicant Under 6 years 6 to 11 years 12 to 17 years 18 years and above
At what age do you plan to retire?		
National Insurance Number		
Country of birth		
Nationality (required for regulatory reasons)		
Dual Nationality (if applicable)		
If you are a Non-British/Irish national, please complete the relevant additional information section		
Are or will you be resident in the UK for tax purposes when the mortgage has completed?	Yes ☐ No ☐	Yes ☐ No ☐
If No, will a family member who is a permanent UK resident be a joint party to this mortgage and occupy the property on completion?	Yes ☐ No ☐	Yes ☐ No ☐
Telephone numbers:	First Applicant	Second Applicant
Home (incl STD code)		
Work (incl STD code)		
Mobile telephone number		
Email address		

Please note: For existing Nationwide customers, any contact details entered will not update the information Nationwide holds. If your applicant wishes to update their existing contact details, please ask them to contact us directly. If your applicant would like to receive updates on their application via SMS and/or email, please enter their mobile number and/or email address above. Please do not enter your own email address.

2. Your 3 year UK address history

	First Applicant	Second Applicant
Address of mortgaged property		
Postcode		
Is this property currently let?	Yes ☐ No ☐	Yes ☐ No ☐
Property description	If Yes, you are not eligible for Additional Borrowing to be secured against this property.	
Property type	House ☐ Bungalow ☐ Purpose built flat ☐ Maisonette ☐ Converted flat ☐ Converted maisonette ☐	
Present occupancy status e.g. Owner Occupier/Council or Private Tenant/Living with relatives/etc	Detached ☐ Semi detached ☐ Terraced ☐ Other (inc. Flats) ☐	If the property is a flat, how many floors does the building have? Floor number of Flat
Please state your current residential address if not the mortgaged property, plus any previous address(es) in the last three years.	Is there a lift? Yes ☐ No ☐ Number of bedrooms	
Postcode		
Date moved in		
Occupancy status for previous address		

Please continue on the Additional Information section at the end of this form if necessary

3. Your employment and income details

	First Applicant	Second Applicant
1. Main Employment		
How are you employed?	Employed ☐	Employed ☐
	Self Employed (Partner) ☐	Self Employed (Partner) ☐
	Self Employed (Sole Trader) ☐	Self Employed (Sole Trader) ☐
	Director/Shareholder with 20% or less shareholding ☐	Director/Shareholder with 20% or less shareholding ☐
	Director/Shareholder with more than 20% shareholding ☐	Director/Shareholder with more than 20% shareholding ☐
	Unemployed ☐	Unemployed ☐
	Homemaker ☐	Homemaker ☐
	Retired ☐	Retired ☐
	Student ☐	Student ☐
What is your employment type?	Permanent ☐	Permanent ☐
	Temporary ☐	Temporary ☐
	Fixed Term Contract ☐	Fixed Term Contract ☐
	Sub-Contractor Fixed Term ☐	Sub-Contractor Fixed Term ☐
	Sub-Contractor Open Ended ☐	Sub-Contractor Open Ended ☐
What industry do you work in?		
What is your specific occupation/ job title?		
Name and address of employer/ self employed business address		
Postcode		
Telephone (incl STD code)		
Is this the correct address to write to for a reference?	Yes ☐ No ☐	Yes ☐ No ☐
Length of service with your current employer or self-employed trading		

Contracting Applicants

Annual gross salary? £

3. Your employment and income details (continued)

3. Second Employment

How are you employed?

Please complete this section only if you have a second job

Employed ☐
Self Employed (Partner) ☐
Self Employed (Sole Trader) ☐
Director/Shareholder with 20% or less shareholding ☐
Director/Shareholder with more than 20% shareholding ☐

Employed ☐
Self Employed (Partner) ☐
Self Employed (Sole Trader) ☐
Director/Shareholder with 20% or less shareholding ☐
Director/Shareholder with more than 20% shareholding ☐

What is your employment type?

Permanent ☐
Temporary ☐
Fixed Term Contract ☐
Sub-Contractor Fixed Term ☐
Sub-Contractor Open Ended ☐

Permanent ☐
Temporary ☐
Fixed Term Contract ☐
Sub-Contractor Fixed Term ☐
Sub-Contractor Open Ended ☐

What is your specific occupation/
job title?

Length of service with your
current employer or
self-employed trading

Name and address of employer/
self-employed business address

Postcode

Telephone (incl STD code)

Is this the correct address to
write to for a reference?

Yes ☐ No ☐

Yes ☐ No ☐

If No, please put the correct address in Additional Information section at the end of this form

Contracting Applicants

How long have you been
contracting?

How long is remaining on your
current contract?

If you are a sub-contractor, are
you employed for tax purposes?

Yes ☐ No ☐

Yes ☐ No ☐

Income Details

Note: W = Weekly,
4W = Four Weekly, M = Monthly,
Q = Quarterly and A = Annually

Gross Salary (before tax &
national insurance)

£ per annum

Frequency of payment

£ per annum

Frequency of payment

Bonus

£ per

W 4W M Q A

£ per

W 4W M Q A

Overtime

£ per

W 4W M Q A

£ per

W 4W M Q A

Commission

£ per

W 4W M Q A

£ per

W 4W M Q A

If you are self employed, amount
and share of net profit/income

£ latest year %

£ previous year %

£ latest year %

£ previous year %

or if you are a Director/
Shareholder of a Limited
Company with greater than
20% shareholding, please
provide annual salary/dividend

£ latest year

£ previous year

£ latest year

£ previous year

You don't need to provide evidence of your income for second employment with your application, we'll let you know if we require this.

Name, address and telephone
number of accountant

Postcode

Telephone (incl STD code)

4. Other income details

Please ensure that all applicants are not intending to use any income which is received in a foreign currency to support their mortgage application.

First Applicant

Second Applicant

Child benefit

£ per month

£ per month

State disability benefit

£ per month

£ per month

Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application. If you'd like to find out more, please see 'How Nationwide uses your information' at nationwide.co.uk/privacy or in branch.

Universal credit/tax credit

£ per month

£ per month

Investment income

£ per month

£ per month

Maintenance

£ per month

£ per month

Rental income from a mortgage free property

£ per month

£ per month

Pension income

£ per month

£ per month

If you have any other NBS mortgages that are rented, please enter the total monthly rental income.

£ per month

£ per month

5. Anticipated retirement income

Nationwide will use your declared retirement date to determine whether you will be borrowing into retirement. If you are within 10 years of this date and will be borrowing into retirement please complete the following anticipated income details. Please ensure that all applicants are not intending to use any income which is received in a foreign currency to support their mortgage application.

First Applicant

Second Applicant

Annual investment income (including dividends)

£ per annum

£ per annum

Annual maintenance income

£ per annum

£ per annum

Annual rental from a mortgage free property

£ per annum

£ per annum

Annual pension income (including annuities)

£ per annum

£ per annum

Annual child benefit

£ per annum

£ per annum

Annual state disability benefit

£ per annum

£ per annum

Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application. If you'd like to find out more, please see 'How Nationwide uses your information' at nationwide.co.uk/privacy or in branch.

Annual universal credit/tax credit

£ per annum

£ per annum

Dividend income from an applicant that owns a share in a business

£ per annum

£ per annum

Dividend income from a portfolio of shares

£ per annum

£ per annum

Income from a company the applicant owns that will continue to provide an income into retirement

£ per annum

£ per annum

6. Monthly outgoings details

First Applicant

Second Applicant

Current account details: Bank/Building Society name and address

Postcode

Sort code and account number

Account holder(s) name(s)

How long have you held this account?

6. Monthly outgoings details (continued)

	First Applicant	Second Applicant
Total monthly childcare expenditure	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on school fees	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on CSA and/or maintenance	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Additional monthly expenditure to financial dependants	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly travel expenditure	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any personal loan/hire purchase with more than six months to run	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any Deferred Purchase Agreements with more than six months to run (Deferred Purchase Agreements are buy now, pay later contracts that you have in place)	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any secured loans with more than six months to run	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any student loans	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total outstanding credit card balance	£ £ £ £ £ £ £	£ £ £ £ £ £ £
Do you have any other regular outgoings, other than basic living expenses, that you have not already provided and that you would not want to give up, in order to pay your mortgage payments?	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month

For any additional expenditure, please complete the details in the Additional Information section at the end of this form if necessary.

6a. Monthly outgoings details

Total monthly expenditure on any personal loan/hire purchase that is being cleared on or before completion	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any Deferred Purchase Agreements that are being cleared on or before completion (Deferred Purchase Agreements are buy now, pay later contracts that you have in place)	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any secured loans that are being cleared on or before completion	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total monthly expenditure on any student loans that are being cleared on or before completion	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Total outstanding credit card balance that is being cleared on or before completion	£ £ £ £ £ £ £	£ £ £ £ £ £ £

7. Property outgoings details

Please enter your annual payments for:			
Council tax	£ £ £ £ £ p p per annum		
Ground rent	£ £ £ £ £ p p per annum		
Service charge(s)	£ £ £ £ £ p p per annum		
Buildings insurance	£ £ £ £ £ p p per annum		
Shared Ownership rent amount	£ £ £ £ £ p p per annum		
Current Mortgage Details	First Applicant	Mortgage 2	Mortgage 3
Total outstanding balance	£ £ £ £ £ £ £	£ £ £ £ £ £ £	£ £ £ £ £ £ £

7. Property outgoings details (continued)

	First Applicant	Second Applicant	Mortgage 2	Mortgage 3
Total interest only amount	£	£	£	£
Term remaining	Y Y M M	Y Y M M	Y Y M M	Y Y M M
Do you let any of these properties?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
If yes, do you have a tenancy agreement in place for any of the properties you let?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Total monthly mortgage payment	£ p	£ p	£ p	£ p
Total monthly rental income	£ p	£ p	£ p	£ p
Will you remain on the mortgage after completion of this mortgage?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
If Yes, please specify the mortgage balance that will be continuing:	£	£	£	£
If No, please complete the relevant additional information section.				
Current Mortgage Details	Second Applicant			
	Mortgage 1	Mortgage 2	Mortgage 3	
Total outstanding balance	£	£	£	£
Total interest only amount	£	£	£	£
Term remaining	Y Y M M	Y Y M M	Y Y M M	Y Y M M
Do you let any of these properties?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
If yes, do you have a tenancy agreement in place for any of the properties you let?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Total monthly mortgage payment	£ p	£ p	£ p	£ p
Total monthly rental income	£ p	£ p	£ p	£ p
Will you remain on the mortgage after completion of this mortgage?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
If Yes, please specify the mortgage balance that will be continuing:	£	£	£	£
If No, please complete the relevant additional information section.				

8. Future changes to circumstances

Do you know of any reductions to your income during the term of the mortgage?

Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application. If you'd like to find out more, please see 'How Nationwide uses your information' at nationwide.co.uk/privacy or in branch.

9. Your credit history

	First Applicant	Second Applicant
Have you been declared bankrupt or entered into a voluntary arrangement with a creditor in the last 6 years?	Yes ☐ No ☐	Yes ☐ No ☐
Have you ever had a property repossessed?	Yes ☐ No ☐	Yes ☐ No ☐

10. Additional borrowing requirements

10. Additional borrowing requirements (continued)

Existing Mortgage

Is any existing mortgage or existing additional borrowing taken on an interest only basis?

Yes ☐ No ☐

If Yes, current outstanding balance

£

How much of this balance is on an interest only basis

£

Remaining term

How have you chosen to repay your existing mortgages/ additional borrowing?

Repayment ☐

Investment backed (Interest only) ☐

Part investment backed & part repayment ☐

If part investment backed, what is the value of this part?

£

If investment backed (interest only) how do you intend to repay the capital element of the mortgage?

New ISA ☐

Existing ISA ☐

New endowment policy ☐

Existing endowment policy ☐

New pension plan ☐

Existing pension plan ☐

Sale of second property ☐

Sale of main residence ☐

Estimated value of second property

£

If repayment strategy is 'Sale of second property', please complete the 'Other properties' section

Are all persons named on this repayment strategy also applicants for this additional borrowing?

Yes ☐ No ☐

If endowment/pension/ISA linked please list the policies to be used:

Policy provider

Policy start date

Policy maturity date

Latest estimated maturity value

£

Monthly cost

£

Please continue on the 'Additional Information' section at the end of this form

11. Your mortgage requirements

Property Ownership Type

Standard Purchase ☐

Purchase Price

£

Full Market Value

£

12. Other details

Please give the names of anyone who is or will be 17 or over, who is living in the property but not on the mortgage (not Scotland).

Title

Forename

Surname

In England, Wales and Northern Ireland, all adults who will occupy the property at the time of the advance other than the borrowers will be required to sign the Society's Form of Consent to Mortgage.

☐

If there are more than two, please write the name(s) of any other(s) in the Additional Information section at the end of this form.

If NONE please tick here

13. Your solicitor/licensed conveyancer

Please note, solicitor/conveyancer details are only required if the reasons for additional borrowing are either of the following:

- Buy freehold title or new extended lease
- Buy land to extend security

Name and address of your solicitor or licensed conveyancer

Postcode

If you have not already instructed a solicitor, the Society will be able to put you in touch with one.

Contact

Telephone (incl STD code)

OFFICE USE ONLY Code

14. Use of my information



Use of my information

This is a summary of how Nationwide uses your personal information, if you'd like a more detailed explanation, please see Nationwide's full privacy statement 'How Nationwide uses your information', available in branch or online at nationwide.co.uk/privacy

1. We collect and use your information so we can offer and manage your accounts, confirm your ID, prevent fraud, provide services to you, collect and recover debt and run our business.
2. We share your information as necessary within Nationwide, with our suppliers and with any third parties you've asked to act on your behalf. Information is shared with our insurance partners when applying for a Nationwide insurance product or it is a benefit of your account (e.g. FlexPlus).
3. If the law requires or allows us to, we'll also share information as necessary with other organisations. This includes credit reference agencies, fraud prevention agencies and other government bodies, regulators and law enforcement agencies.
4. When we share your information with credit reference agencies they'll use this to check your credit rating, along with the other details you've given us. These checks are part of most account application processes – however, they will leave a record on your credit file that other lenders can see. This might affect your ability to get credit elsewhere for a short while.
5. When we share your information with fraud prevention agencies they will use the data to prevent fraud and money laundering and verify your identity. If we believe someone poses a fraud or money laundering risk, we may refuse to provide the product they have asked for and we may also stop providing services they already have. The fraud prevention agencies will keep a record of any fraud or money laundering risk and this could mean that other organisations may refuse to provide services, financing or employment.
6. When we transfer information to third parties and organisations, whether inside or outside the UK, we'll make sure we only give them information that's necessary and that your data will stay secure.
7. We may, if applicable, give the Intermediary who introduces this mortgage application to you, a copy of any offer we make or the reason for declining the application, a copy of any valuation we ask to be carried out, details of any complaints you make before completion and any other information we consider necessary to process your application through to completion.
8. We only use your information if we have a legal basis to do so, for example, if you have given us consent or if we need to use the information to meet our obligations to you in our terms and conditions. We may also use your information if necessary to comply with the law or to carry out our legitimate business interests.
9. By making this application, I'm confirming that the other applicant, if applicable, has agreed to share a financial relationship with me. Also, that they're happy for Nationwide to authorise searches, and for links and/or recordings of their information to be made with credit reference agencies.
10. You have certain rights when it comes to your personal information including the right to access your data. Further details on these rights and who to contact are available in branch or online at nationwide.co.uk/privacy

By signing this application, I agree to the declaration. If applicable, I also agree to be bound by the terms of your charitable assignment scheme provided to me in my application, which means I will not receive a bonus if Nationwide converts to a bank.

First applicant's signature _____

Date DD MM YYYY

Second applicant's signature _____

Date DD MM YYYY

Intermediary

- Where a client is not present to sign the declaration, I confirm that the information on this form has been provided by the applicant(s) to me and I have made him/her aware to which lender the information will be passed. I also confirm that I have read him/her the full declaration detailing use of this information.

Signature of Intermediary recording information _____

Date DD MM YYYY

Nationwide Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 106078. You can confirm our registration on the FCA's website [fca.org.uk](https://www.fca.org.uk)

15. Declaration, use of my information and charitable assignment

Declaration

I (each of us if more than one is applying) agree that:

- you will rely on the information I have given you on this form, which I confirm is complete and true. You may decide to decline my application;
- as well as your Mortgage Conditions, Nationwide's Rules apply to this account and I can obtain a copy of these in any of your branches;
- you must have the property valued for your own purposes. You recommend that I arrange for a more detailed inspection for my own purposes;
- you will keep any form of commission insurers may give you for arranging my insurance with them as part of this mortgage;
- if I take out a mortgage with you, you may transfer it to another lender who may not be (or be associated with) a building society. You will tell me before you do this and how it will affect my mortgage, but I will no longer have the benefit of your Rules;
- if applicable, I may have to show where the money for the deposit on the property I am buying came from;
- for joint applications, Nationwide will only send documents and correspondence to one address. Before completion of the mortgage, this will be the address of the first applicant and after completion, this will be the security address or an agreed correspondence address;
- in the case of a remortgage, Nationwide will instruct a solicitor to deal with the legal aspects of my remortgage and pay the fees. I will be responsible for any non-standard legal fees in relation to the remortgage, including any independent legal advice I wish to take;
- Fixed and tracker rates are limited offers and may be withdrawn at any time;
- where I have indicated that debt will be repaid, on or before completion, you will disregard it from your assessment of my application as you will regard my signature on this application form as being my undertaking to repay this debt.



Use of my information

This is a summary of how Nationwide uses your personal information, if you'd like a more detailed explanation, please see Nationwide's full privacy statement "How Nationwide uses your information", available in branch or online at nationwide.co.uk/privacy

- We collect and use your information so we can offer and manage your accounts, confirm your ID, prevent fraud, provide services to you, collect and recover debt and run our business.
- We share your information as necessary within Nationwide, with our suppliers and with any third parties you've asked to act on your behalf. Information is shared with our insurance partners when applying for a Nationwide insurance product or it is a benefit of your account (e.g. FlexPlus).
- If the law requires or allows us to, we'll also share information as necessary with other organisations. This includes credit reference agencies, fraud prevention agencies and other government bodies, regulators and law enforcement agencies.
- When we share your information with credit reference agencies they'll use this to check your credit rating, along with the other details you've given us. These checks are part of most account application processes – however, they will leave a record on your credit file that other lenders can see. This might affect your ability to get credit elsewhere for a short while.
- When we share your information with fraud prevention agencies they will use the data to prevent fraud and money laundering and verify your identity. If we believe someone poses a fraud or money laundering risk, we may refuse to provide the product they have asked for and we may also stop providing services they already have. The fraud prevention agencies will keep a record of any fraud or money laundering risk and this could mean that other organisations may refuse to provide services, financing or employment.
- When we transfer information to third parties and organisations, whether inside or outside the UK, we'll make sure we only give them information that's necessary and that your data will stay secure.
- We may, if applicable, give the Intermediary who introduces this mortgage application to you, a copy of any offer we make or the reason for declining the application, a copy of any valuation we ask to be carried out, details of any complaints you make before completion and any other information we consider necessary to process your application through to completion.
- We only use your information if we have a legal basis to do so, for example, if you have given us consent or if we need to use the information to meet our obligations to you in our terms and conditions. We may also use your information if necessary to comply with the law or to carry out our legitimate business interests.
- By making this application, I'm confirming that the other applicant, if applicable, has agreed to share a financial relationship with me. Also, that they're happy for Nationwide to authorise searches, and for links and/or recordings of their information to be made with credit reference agencies.
- You have certain rights when it comes to your personal information including the right to access your data. Further details on these rights and who to contact are available in branch or online at nationwide.co.uk/privacy

CHARITABLE ASSIGNMENT

THE FOLLOWING WORDING APPLIES TO YOU UNLESS:

(1) YOU WERE A MEMBER OF THE SOCIETY ON 2 NOVEMBER 1997 AND HAVE CONTINUED TO BE A MEMBER EVER SINCE THAT DATE; OR

(2) YOU FALL WITHIN A SPECIAL CATEGORY OF PERSONS TO WHOM OUR CHARITABLE ASSIGNMENT SCHEME DOES NOT APPLY.

By applying to open an account after 2nd November 1997, you also apply to be a charity member of The Nationwide Foundation ("the Foundation") unless you are already a charity member.

You agree that, if:

- the account is opened by the Society and you are or become a charity member of the Foundation; and
- the Society subsequently enters into an agreement to transfer the whole of its business to a company,

you will assign to the Foundation (or any charity(ies) nominated by it, but to no other person) all rights to or in connection with any conversion benefits to which you would otherwise become entitled as a member or depositor at any time before, or within two years, after your membership of the Society comes to an end.

You make this agreement:

- with the Society (acting for itself and for the benefit of the Foundation), in return for the Society opening the account you are applying for, and you acknowledge that the Foundation may enforce the benefit of your agreement with the Society under the Contracts (Rights of Third Parties) Act 1999; and
- with the Foundation directly, in return for the Foundation granting you charity membership (if you are not already a member).

This agreement means that, without any further notice to you:

- the Society may make over to the Foundation (or to any charity(ies) nominated by it) any such conversion benefits; and
- the Foundation may exercise all your rights in relation to any such benefits.

You understand that this agreement is irrevocable and cannot be amended or varied without the consent of both the Society and the Foundation and that neither the Society nor the Foundation will release you from this agreement.

You understand that (except in the case of any class of person where the Society considers this to be inappropriate) the Society will require on behalf of itself and the Foundation that all applicants for share and mortgage accounts agree to the above condition (or a condition having substantially the same effect), unless the Society decides and announces by press release that it is no longer in the best interests of the Society to do so generally on a continuing basis. Any such decision by the Society would not have retrospective effect and you would continue to be bound by the above condition.

For this purpose:

"conversion benefits" means any benefits under the terms of any future transfer of the Society's business to a company (i.e. on conversion or takeover) except the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company; and "Society" means Nationwide Building Society and, if it merges with any other building society, includes such other society.

I hereby authorise Nationwide Building Society to obtain a reference(s) from any Mortgagee/Landlord/Accountant named in this application and details of my employment from my current or previous employer(s).

Further, I hereby irrevocably authorise the Society to obtain all such information regarding my Equity ISA/Endowment/Pension and any insurances referred to in this application.

I authorise any lender with whom I hold a mortgage or loan account to provide Nationwide with repayment figures for all my outstanding loans or charges on my property and to release the title deeds and documents to Nationwide upon their request.

I have read and agree to the declaration and, if applicable to me, the Charitable Assignment that I have received with this application.

I confirm that where fees are collected by credit/debit card that this is with my authority for payment, having originally provided details to you.

I understand that these credit card details will not be retained after the payments have been taken.

First Applicant

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Second Applicant

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Please tick to confirm that all account holders are happy to continue

Nationwide Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 106078. You can confirm our registration on the FCA's website [fca.org.uk](https://www.fca.org.uk)

Nationwide Home Insurance is underwritten and administered by Royal & Sun Alliance Insurance Ltd (No. 93792). Registered in England and Wales at St. Mark's Court, Chart Way, Horsham, West Sussex, RH12 1XL. Nationwide Building Society and Royal & Sun Alliance Insurance Ltd are both authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Nationwide Building Society is registered at Nationwide House, Pipers Way, Swindon, Wiltshire SN38 1NW. Calls may be recorded and monitored.

16. Your monthly payments

How would you like to make the payments on your additional borrowing?

Direct Debit ☐ Transfer from a Nationwide current account ☐ Standing Order ☐ Cash/Credit ☐

Payments by Direct Debit or Transfer from a Nationwide current account may be required for certain products. Where payments are made by Direct Debit or Transfer from a Nationwide current account, we will give you at least seven days' notice of any change in your payments.

To link to an existing Direct Debit please tick the box ☐

THE DIRECT DEBIT GUARANTEE (Please retain this)



- This Guarantee is offered by all Banks and Building Societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit Nationwide Building Society will notify you seven days in advance of your account being debited or as otherwise agreed.
If you request Nationwide Building Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Nationwide Building Society or your Bank or Building Society, you are entitled to a full and immediate refund of the amount paid from your Bank or Building Society.
 - If you receive a refund you are not entitled to, you must pay it back when Nationwide Building Society asks you to.
- You can cancel a Direct Debit at any time by simply contacting your Bank or Building Society. Written confirmation may be required. Please also notify us.

Instruction to your Bank or Building Society to pay by Direct Debit



Please complete this form in BLOCK CAPITALS using blue or black ink

Originator's Identification Number

Reference number

The following bank details below must match the details that the existing mortgage payments are taken from as these will be used to:

- Collect the applicant's mortgage payments by Direct Debit
 - Pay and cashback if the selected product includes this
- Pay the additional borrowing funds requested in this application, upon completion.

Your bank or building society details

Bank/Building Society name

Name(s) of account holder(s)

Bank/Building Society
Sort code & account number

Banks and Building Societies may not accept Direct Debit instructions from some types of account.

Please pay Nationwide Building Society Direct Debits from the account detailed in this instruction, subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Nationwide Building Society and, if so, details will be passed electronically to my Bank/Building Society.

First Applicant

☐

Date

Second Applicant

☐

Date

Please tick to confirm that all account holders are happy to continue

This is not part of the instruction to your Bank or Building Society.

The payment date will default to the payment date of your existing mortgage accounts.

The Direct Debit Guarantee on this page should be detached and kept by the account holder.

17. Additional information

Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application.

Details of previous addresses including dates moved in

Details of properties taken into possession and mortgage/rent arrears

Correct address to write to for a reference

Further details of other regular monthly outgoings including all information requested

Details of bankruptcy, insolvency, arrangements with creditors etc

Details of county court judgments etc

Additional endowment policies

Construction of property

For Non UK/ROI nationals

Are you seeking asylum in the UK?

Yes ☐ No ☐

If No, do you hold refugee status as recognised under the 1951 UN conventions & its 1967 protocol?

Yes ☐ No ☐

Do you have indefinite leave to remain/Settled status in the UK?

Yes ☐ No ☐

If No, do you have pre-settled status or an acceptable visa as outlined on nationwide-intermediary.co.uk?

Yes ☐ No ☐

Have you legally been a UK resident for at least three years?

Yes ☐ No ☐

Do you hold diplomatic immunity status?

Yes ☐ No ☐

If you are not a refugee and do not have indefinite leave to remain settled status in the UK:

Is your salary paid to a UK bank account?

Yes ☐ No ☐

Do you hold diplomatic immunity status? (Non British applicants only)

Yes ☐ No ☐

17. Additional information (continued)

Details of properties for which the applicant will not remain on the mortgage after completion: Applicant 1

Mortgage 1:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold?

Yes ☐ No ☐

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation?

Yes ☐ No ☐

Mortgage 2:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold?

Yes ☐ No ☐

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation?

Yes ☐ No ☐

Mortgage 3:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold?

Yes ☐ No ☐

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation?

Yes ☐ No ☐

Details of properties for which the applicant will not remain on the mortgage after completion: Applicant 2

Mortgage 1:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold?

Yes ☐ No ☐

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation?

Yes ☐ No ☐

Mortgage 2:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold?

Yes ☐ No ☐

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation?

Yes ☐ No ☐

Mortgage 3:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold?

Yes ☐ No ☐

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation?

Yes ☐ No ☐

Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application.

Any other additional information.

18. Declaration and Use of my information

Declaration

I (each of us if more than one is applying) agree that:

- (a) you will rely on the information I have given you on this form, which I confirm is complete and true. It is a criminal offence to knowingly supply false information to obtain a loan. You may decide to decline my application;
- (b) as well as your Mortgage Conditions, Nationwide's Rules apply to this account and I can obtain a copy of these in any of your branches;
- (c) you must have the property valued for your own purposes. I can arrange for a more detailed inspection for my own purposes;
- (d) you will keep any form of commission insurers may give you for arranging my insurance with them as part of this mortgage;
- (e) if I take out a mortgage with you, you may transfer it to another lender who may not be (or be associated with) a building society. You will tell me before you do this and how it will affect my mortgage, but I will no longer have the benefit of your Rules;
- (f) if applicable, I may have to show where the money for the deposit on the property I am buying came from;
- (g) for joint applications, Nationwide will only send documents and correspondence to one address. Before completion this will be the address of the first applicant and after completion, this will be the security address or an agreed correspondence address;
- (h) Fixed and Tracker rates are limited offers and may be withdrawn at any time;
- (i) where I have indicated that debt will be repaid, on or before completion, you will disregard it from your assessment of my application as you will regard my signature on this application form as being my undertaking to repay this debt;
- (j) if applicable, and where requested, Nationwide will instruct a solicitor to deal with the legal aspects of my mortgage and pay the fees. I will be responsible for any non-standard legal fees in relation to the mortgage, including any independent legal advice I wish to take.

Use of my information

This is a summary of how Nationwide uses your personal information, if you'd like a more detailed explanation, please see Nationwide's full privacy statement "How Nationwide uses your information", available in branch or online at nationwide.co.uk/privacy

1. We collect and use your information so we can offer and manage your accounts, confirm your ID, prevent fraud, provide services to you, collect and recover debt and run our business.
2. We share your information as necessary within Nationwide, with our suppliers and with any third parties you've asked to act on your behalf. Information is shared with our insurance partners when applying for a Nationwide insurance product or it is a benefit of your account (e.g. FlexPlus).
3. If the law requires or allows us to, we'll also share information as necessary with other organisations. This includes credit reference agencies, fraud prevention agencies and other government bodies, regulators and law enforcement agencies.
4. When we share your information with credit reference agencies they'll use this to check your credit rating, along with the other details you've given us. These checks are part of most account application processes – however, they will leave a record on your credit file that other lenders can see. This might affect your ability to get credit elsewhere for a short while.
5. When we share your information with fraud prevention agencies they will use the data to prevent fraud and money laundering and verify your identity. If we believe someone poses a fraud or money laundering risk, we may refuse to provide the product they have asked for and we may also stop providing services they already have. The fraud prevention agencies will keep a record of any fraud or money laundering risk and this could mean that other organisations may refuse to provide services, financing or employment.
6. When we transfer information to third parties and organisations, whether inside or outside the UK, we'll make sure we only give them information that's necessary and that your data will stay secure.
7. We may give the Intermediary who introduces this mortgage application to you, a copy of any offer we make or the reason for declining the application, a copy of any valuation we ask to be carried out, details of any complaints you make before completion and any other information we consider necessary to process your application through to completion.
8. We only use your information if we have a legal basis to do so, for example, if you have given us consent or if we need to use the information to meet our obligations to you in our terms and conditions. We may also use your information if necessary to comply with the law or to carry out our legitimate business interests.
9. By making this application, I'm confirming that the other applicant, if applicable, has agreed to share a financial relationship with me. Also, that they're happy for Nationwide to authorise searches, and for links and/or recordings of their information to be made with credit reference agencies.
10. You have certain rights when it comes to your personal information including the right to access your data. Further details on these rights and who to contact are available in branch or online at nationwide.co.uk/privacy

19. Consent and Authority to obtain references

I hereby authorise Nationwide Building Society to obtain a reference(s) from any Mortgagee/Landlord/Accountant named in this application and details of my employment from my current or previous employer(s).

I agree to the declaration. If applicable, I also agree to be bound by the terms of your charitable assignment scheme provided to me in my application pack, which means won't receive a bonus if Nationwide converts to a bank.

Further, I hereby irrevocably authorise the Society to obtain all such information regarding my ISA/endowment/pension and any insurances referred to in this application.

I authorise any lender with whom I hold a mortgage or loan account to provide Nationwide with repayment figures for all my outstanding loans or charges on my property and to release the title deeds and documents to Nationwide upon their request.

I confirm that where fees are collected by credit/debit card that this is with my authority for payment, having originally provided details to you.

I understand that these credit card details will not be retained after the payments have been taken.

First Applicant

☐

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Second Applicant

☐

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Please tick to confirm that all account holders agree to the declaration

20. Release of additional borrowing funds

Once we've issued your applicant's mortgage offer, our 9 day reflection period will start from the date stated on your offer. Once these 9 days have passed, we'll transfer the funds to the bank account listed in section 15 above.

Mortgage fees

Dependent on your application type, a non-refundable booking fee may need to be paid upfront upon reservation. Applications without a booking fee (if applicable) will not be reserved. Fees can be paid via card or cheque, please complete the following section(s) if you are paying fees by card or alternatively enclose a signed cheque for the applicable fees.

Booking fee amount

£

 The information I provide relating to my debit/credit card will be used to take a payment for £_____ to cover the booking fee. Once this payment has been processed, the details will be destroyed. By providing my debit/credit card details I agree you can use my information in this way.

Please charge my VISA / MasterCard / Solo (delete as applicable).

Card number

Name(s) of account holder(s)

Expiry date

Start date (if applicable)

Issue number (if applicable)

Signature

Date

Name as shown on card

Product fee amount

£

Add fee to loan Yes ☐ No ☐

 The information I provide relating to my debit/credit card will be used to take a payment for £_____ to cover the product fee. Once this payment has been processed, the details will be destroyed. By providing my debit/credit card details I agree you can use my information in this way.

Please use the same card details as above ☐

Please charge my VISA / MasterCard / Solo (delete as applicable).

Card number

Name(s) of account holder(s)

Expiry date

Start date (if applicable)

Issue number (if applicable)

Signature

Date

Name as shown on card

Valuation fee amount

£

 The information I provide relating to my debit/credit card will be used to take a payment for £_____ to cover the valuation fee. Once this payment has been processed the details will be destroyed. By providing my debit/credit card details I agree you can use my information in this way.

Please use the same card details as above ☐

Please charge my VISA / MasterCard / Solo (delete as applicable).

Card number

Name(s) of account holder(s)

Expiry date

Start date (if applicable)

Issue number (if applicable)

Signature

Date

Name as shown on card

If you choose to use the same card for all of the fees, this will show as separate payments on your bank statement. All card details will be destroyed after payment has been authorised.

For office use only

Identification requirements:		First Applicant		Second Applicant
Confirming name	Type:		Type:	
	Serial Nos:		Serial Nos:	
Confirming address	Type:		Type:	
	Serial Nos:		Serial Nos:	
Additional check (remote only)	Type:		Type:	
	Serial Nos:		Serial Nos:	
Branch/Employees details		PrefixEmployee No.		SCA QQ Number