Data Capture Form

This form is for intermediaries' internal use only and is not approved for issuing to customer(s). The information on this form may be used to assist the intermediary if an application is made to Nationwide. This form should not be used as an indication of Nationwide's lending criteria, which you can find by visiting **nationwide-intermediary.co.uk/lending-criteria**

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.

1. Applicant Details

Applicant Details	Applicant 1	Applicant 2
Title		
Forename		
Second name		
Surname		
Gender	☐ Male ☐ Female	☐ Male ☐ Female
Country of birth		
Date of birth	D D M M Y Y	D D M M Y Y
National Insurance number		
Postcode		
	Details of Financial dependants Aged from 0-5 ☐ Aged from 6-11 ☐ Aged from 12-17 ☐ Aged 18 and above ☐	Details of Financial dependants Aged from 0-5 ☐ Aged from 6-11 ☐ Aged from 12-17 ☐ Aged 18 and above ☐
Are you intending to port any loans?	☐ Yes ☐ No If yes, please provide the existing mortgage account number ______ The bank account number the Direct Debit is taken from ______	☐ Yes ☐ No If yes, please provide the existing mortgage account number ______ The bank account number the Direct Debit is taken from ______
Application type	☐ New purchase ☐ Remortgage ☐ Additional borrowing	
What is this property application for?	☐ Owner occupation	☐ Second property
If a second property application, please indicate what the intended use of the property is?	☐ Main residence ☐ Home for dependant relative	☐ Holiday home in the UK ☐ Second property due to work location
Applicant type	☐ First time buyer ☐ Existing Nationwide borrower ☐ Borrower with another lender ☐ Previous Nationwide borrower ☐ Previous borrower with another lender	☐ First time buyer ☐ Existing Nationwide borrower ☐ Borrower with another lender ☐ Previous Nationwide borrower ☐ Previous borrower with another lender
Property ownership type	☐ Standard ☐ Right to Buy ☐ Shared ownership ☐ Equity share	☐ Restricted Resale Price ☐ Genuine bargain price
Does the applicant own a mortgage free property?	☐ Yes ☐ No	☐ Yes ☐ No
If yes, what is the estimated value?	£	

Purchase Right To Buy	Loan amount?	£
	Discounted purchase price?	£
	What is the full market value of the property?	£
Remortgage Right To Buy	Original Date of Purchase?	D D M M Y Y
	Loan amount?	£
	Current estimated value?	£
	What is the amount being transferred from another lender?	£
Purchase shared ownership detail	What is the purchase price of your share?	£
	What is the full market value of the property?	£
Remortgage Shared Ownership Details	What is the amount being transferred from another lender?	£
Is the property to be used for residential purposes?		☐ Yes ☐ No
Loan amount		£
Repayment Type*	☐ Interest Only ☐ Capital and Interest ☐ Part and Part *If Part & Part please state the split Repayment £	Interest only £
What is the purchase price or current estimated value?		£
Term of mortgage		Y Y M M
If applicable – what is the amount being transferred from another lender?		£
Purchase equity share detail	What type of equity share scheme is it? ☐ Builder's equity loan	☐ Housing Association/Local Authority/National Gov't ☐ Developer and HCA/GLA Co-Funded
	What is the purchase price of the share?	£
	What is the full market value of the property?	£
	Equity shareholder name	
	What date does the equity share loan first become due for repayment?	D D M M Y Y

Restricted resale price	What is the purchase price?	£
	What is the full market value of the property?	Please state the % restriction
Genuine bargain price	What is the purchase price?	£
	What is the full market value of the property?	£

Security Details

Have you found a property yet?	☐ Yes ☐ No
If yes, property type:	☐ Terraced house ☐ Semi detached ☐ Detached house ☐ Terraced bungalow ☐ Semi detached bungalow ☐ Converted flat/maisonette ☐ Purpose built flat/maisonette
Is the property a new build/newly converted or refurbished?	☐ Yes ☐ No
Tenure:	☐ Freehold ☐ Leasehold ☐ Commonhold ☐ Ownership Scotland
Does this application relate to a special scheme?	☐ None ☐ Help to Buy

2. Details of property to be mortgaged

Is the mortgage for the applicants existing residence?	☐ Yes ☐ No	☐ Yes ☐ No
House number		
House name		
Flat		
Street		
Town		
County		
Postcode		
Which area of the UK is the property in?	☐ England & Wales ☐ Northern Ireland ☐ Scotland	
Region of the security address e.g. South West, North East, Greater London		
Tenure	☐ Freehold ☐ Commonhold ☐ Leasehold ☐ Ownership Scotland	
What is your relationship to the seller?	☐ No relationship ☐ Family member ☐ Partner ☐ Friend ☐ Business associate ☐ Work colleague ☐ Employer ☐ Landlord	
If Leasehold, how many years remaining on the lease?		
What will the new or extended term of the lease be at the time of completion?		

3. Source of Deposit (record each source separately).

Part 1 – What is the source of your deposit?

☐ Savings account in UK or EEA ☐ Builder cashback ☐ Vendor cashback or incentive
☐ Savings account outside of UK or EEA ☐ Gift* ☐ Equity ☐ LSAP

* If Gift, please complete the Gifted Deposit declaration form.

How much is from this source?	£
What is/will be your monthly repayment (Loans only)?	£
If from Equity, what is the sale price of the property?	£

Part 2 – What is the source of your deposit? (Please tick one box)

☐ Savings account in UK or EEA ☐ Builder cashback ☐ Vendor cashback or incentive
☐ Savings account outside of UK or EEA ☐ Gift* ☐ Equity ☐ LSAP

How much is from this source?	£
What is/will be your monthly repayment (Loans only)?	£
If from Equity, what is the sale price of the property?	£

* If Gift, please complete the Gifted Deposit declaration form.

Part 3 – What is the source of your deposit? (Please tick one box)

☐ Savings account in UK or EEA ☐ Builder cashback ☐ Vendor cashback or incentive
☐ Savings account outside of UK or EEA ☐ Gift* ☐ Equity ☐ LSAP

How much is from this source?	£
What is/will be your monthly repayment (Loans only)?	£
If from Equity, what is the sale price of the property?	£

4. Mortgage Repayment Vehicle

To apply for Interest Only or Part and Part, you must provide details of the Mortgage Repayment Vehicle(s).

Sale Of Main Residence		☐
UK Savings	Amount for this purpose	£
UK Investments	Amount for this purpose	£
UK Pensions	Amount for this purpose	£
Sale of Other UK property		☐
Property Address		

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Mortgage Provider (if applicable)	
Mortgage balance (if applicable)	
Property Value	

5. Remortgage with Capital Raising	Indicate purpose of Capital Raising	
Repay unsecured debts	☐	Amount for this purpose £
Other personal consumption	☐	Amount for this purpose £
Non structural home improvement	☐	Amount for this purpose £
Structural home improvement	☐	Amount for this purpose £
Buy out partner's interest (non-borrower)	☐	Amount for this purpose £
Buy a share in freehold	☐	Amount for this purpose £
Buy freehold title or new extended lease	☐	Amount for this purpose £
Buy land to extend security	☐	Amount for this purpose £
Buy property for main residence & let current property	☐	Amount for this purpose £
Purchase land/property separate from the security	☐	Amount for this purpose £
Pay off second charge	☐	Amount for this purpose £

6. Additional Borrowing (Further Advance)		
Non-structural home improvements	☐	Amount for this purpose £
Structural home improvements	☐	Amount for this purpose £
Purchase land/property separate from the security	☐	Amount for this purpose £
Buy a share in the freehold	☐	Amount for this purpose £
Buy out partner's interest (non-borrower)	☐	Amount for this purpose £
Other personal consumption	☐	Amount for this purpose £
Repay unsecured debts	☐	Amount for this purpose £

7. Nationality: Inside of the EEA	Applicant 1	Applicant 2
Nationality		
Second Nationality (if applicable)		
Are you a permanent UK resident?	☐ Yes ☐ No	☐ Yes ☐ No
If not a permanent resident – 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
Have you changed your name in the last 3 years?	☐ Yes ☐ No	☐ Yes ☐ No
	Title	Title
	Forename	Forename
	Second name	Second name
	Surname	Surname
	Gender	Gender

Nationality: Outside of the EEA	Applicant 1	Applicant 2
Are you seeking asylum in the UK?	☐ Yes ☐ No	☐ Yes ☐ No
Do you hold refugee status as recognised under the 1951 UN conventions and its 1967 protocol?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have indefinite leave to remain in the UK?	☐ Yes ☐ No	☐ Yes ☐ No

Nationality: Outside of the EEA (cont)	Applicant 1	Applicant 2
Is your salary paid into a UK bank account?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a tier 1/tier 2 work permit/visa?	☐ Yes ☐ No	☐ Yes ☐ No
Have you legally been a UK resident for at least three years?	☐ Yes ☐ No	☐ Yes ☐ No
Do you hold diplomatic immunity status?	☐ Yes ☐ No	☐ Yes ☐ No
Have you changed your name in the last 3 years?	☐ Yes ☐ No	☐ Yes ☐ No
	Title	Title
	Forename	Forename
	Second name	Second name
	Surname	Surname
	Gender	Gender

8. Please note only UK addresses accepted Address Details – Current Address	Applicant 1	Applicant 2
House number		
Flat		
House name		
Street		
District		

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	Applicant 1	Applicant 2
Town		
County		
Postcode		
How long were you at this address?	Y Y M M	Y Y M M
Occupancy Status	☐ Owner occupier ☐ Council tenant ☐ Private tenant ☐ Living with friends/relative ☐ Provided by employer ☐ Renting from a Housing Association	☐ Owner occupier ☐ Council tenant ☐ Private tenant ☐ Living with friends/relative ☐ Provided by employer ☐ Renting from a Housing Association
Is there a letting agent?	☐ Yes ☐ No	☐ Yes ☐ No

Address Details – Previous Address 1	**Applicant 1**	**Applicant 2**
House number		
Flat		
House name		
Street		
District		
Town		
County		
Postcode		
How long were you at this address?	Y Y M M	Y Y M M
Occupancy status	☐ Owner occupier ☐ Council tenant ☐ Private tenant ☐ Living with friends/relative ☐ Provided by employer ☐ Renting from a Housing Association	☐ Owner occupier ☐ Council tenant ☐ Private tenant ☐ Living with friends/relative ☐ Provided by employer ☐ Renting from a Housing Association

Address Details – Previous Address 2	**Applicant 1**	**Applicant 2**
House number		
Flat		
House name		
Street		
District		
Town		
County		
Postcode		
How long were you at this address?	Y Y M M	Y Y M M
Occupancy status	☐ Owner occupier ☐ Council tenant ☐ Private tenant ☐ Living with friends/relative ☐ Provided by employer ☐ Renting from a Housing Association	☐ Owner occupier ☐ Council tenant ☐ Private tenant ☐ Living with friends/relative ☐ Provided by employer ☐ Renting from a Housing Association

9.

Employment Details	**Applicant 1**	**Applicant 2**
Main Employment		
How are you employed?	☐ Permanent ☐ Temporary ☐ Fixed term contract ☐ Sub contractor fixed term ☐ Sub contractor open ended ☐ Sole trader ☐ Partner ☐ Director 20% or less shareholding ☐ Director more than 20% shareholding ☐ Not employed ☐ Retired ☐ Student ☐ Homemaker	☐ Permanent ☐ Temporary ☐ Fixed term contract ☐ Sub contractor fixed term ☐ Sub contractor open ended ☐ Sole trader ☐ Partner ☐ Director 20% or less shareholding ☐ Director more than 20% shareholding ☐ Not employed ☐ Retired ☐ Student ☐ Homemaker
Occupation		
Industry		
Annual salary	£	£
Bonus	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Overtime	£	£

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Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		

Fixed Term Contract

How long have you been contracting?	Y Y M M	Y Y M M
What is the remaining term on current contract?	Y Y M M	Y Y M M
Contract likely to be renewed?	☐ Yes ☐ No	☐ Yes ☐ No
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		

Sub Contractor Open Ended

Are you treated as employed for tax purposes?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes – annual salary	£	£
Bonus	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Overtime	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
If No - Net profit before tax latest period	£	£
If No - Net profit before tax previous period	£	£
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		

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Sub Contractor Fixed Term

How long have you been contracting?	Y Y M M	Y Y M M
What is the remaining term on current contract?	Y Y M M	Y Y M M
Current contract likely to be renewed?	☐ Yes ☐ No	☐ Yes ☐ No
Are you treated as employed for tax purposes?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes – annual salary	£	£
Bonus	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Overtime	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
If No - Net profit before tax latest period	£	£
If No - Net profit before tax previous period	£	£
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		

Sole Trader (Self Employed)

How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Net profit before tax - latest period	£	£
Net profit before tax - previous period	£	£

Partner (Self Employed)	☐ Yes	☐ Yes
How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Share of net profit before tax - latest period	£	£
Share of net profit before tax - previous period	£	£

Director / Shareholder with more than 20% shareholding	☐ Yes	☐ Yes
How long have you been trading?	Y Y M M	Y Y M M
Salary (including dividends) - latest period	£	£
Salary (including dividends) - previous period	£	£
Not employed	☐ Yes	☐ Yes
Retired	☐ Yes	☐ Yes
Student	☐ Yes	☐ Yes
Homemaker	☐ Yes	☐ Yes

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Employment Details	Applicant 1	Applicant 2
Secondary Employment		
How are you employed?	☐ Permanent ☐ Temporary ☐ Fixed term contract ☐ Sub contractor fixed term ☐ Sub contractor open ended ☐ Sole trader ☐ Partner ☐ Director 20% or less shareholding ☐ Director more than 20% shareholding ☐ Not employed ☐ Retired ☐ Student ☐ Homemaker	☐ Permanent ☐ Temporary ☐ Fixed term contract ☐ Sub contractor fixed term ☐ Sub contractor open ended ☐ Sole trader ☐ Partner ☐ Director 20% or less shareholding ☐ Director more than 20% shareholding ☐ Not employed ☐ Retired ☐ Student ☐ Homemaker
Occupation		
Annual salary	£	£
Bonus	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Overtime	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		
Fixed Term Contract		
How long have you been contracting?	Y Y M M	Y Y M M
What is the remaining term on current contract?	Y Y M M	Y Y M M
Contract likely to be renewed?	☐ Yes ☐ No	☐ Yes ☐ No
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		
Sub Contractor Open Ended		
Are you treated as employed for tax purposes?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes – annual salary	£	£
Bonus	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Overtime	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£

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Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
If No - Net profit before tax latest period	£	£
If No - Net profit before tax previous period	£	£
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		

Sub Contractor Fixed Term

How long have you been contracting?	Y Y M M	Y Y M M
What is the remaining term on current contract?	Y Y M M	Y Y M M
Current contract likely to be renewed?	☐ Yes ☐ No	☐ Yes ☐ No
Are you treated as employed for tax purposes?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes – annual salary	£	£
Bonus	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Overtime	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£
Frequency	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly

Sub Contractor Fixed Term (cont)	**Applicant 1**	**Applicant 2**
If No - Net profit before tax latest period	£	£
If No - Net profit before tax previous period	£	£
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	☐ Yes ☐ No	☐ Yes ☐ No
Do you have a previous employer?	☐ Yes ☐ No	☐ Yes ☐ No
If Yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	£
Occupation		

Sole Trader (Self Employed)

How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Net profit before tax - latest period	£	£
Net profit before tax - previous period	£	£

Partner (Self Employed)	☐ Yes	☐ Yes
How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Share of net profit before tax - latest period	£	£
Share of net profit before tax - previous period	£	£

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Director / Shareholder with more than 20% shareholding	☐ Yes	☐ Yes
How long have you been trading?	Y Y M M	Y Y M M
Salary (including dividends) - latest period	£	£
Salary (including dividends) - previous period	£	£
Not employed	☐ Yes	☐ Yes
Retired	☐ Yes	☐ Yes
Student	☐ Yes	☐ Yes
Homemaker	☐ Yes	☐ Yes

10. **Other Income (Monthly)**	**Applicant 1**	**Applicant 2**
Do you have any other income?	☐ Yes ☐ No	☐ Yes ☐ No
Investment income	£	£
Maintenance income	£	£
Rental income from an unencumbered property	£	£
Pension income	£	£
Child Benefit	£	£
State Disability benefit	£	£
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.		
Universal credit/tax credit	£	£
Reduction in Income- are you aware of any changes to your income that is likely to affect your ability to meet your monthly mortgage repayment? If yes provide details		

Retirement Details	**Applicant 1**	**Applicant 2**
At what age do you plan to retire?		
If the term of the mortgage extends into the customer(s) retirement and retirement is within the next 10 years, please provide details of the retirement income.		
Annual investment income (including dividends)	£	£
Annual maintenance income	£	£
Annual rental income from an unencumbered property	£	£
Annual pension income (including annuities)	£	£
Annual Child Benefit	£	£
Annual State Disability benefit	£	£
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.		
Annual universal credit/tax credits	£	£
Reduction in Income- are you aware of any changes to your income that is likely to affect your ability to meet your monthly mortgage repayment? If yes provide details		

11. **Outgoings – Monthly Outgoings/Loans**	**Applicant 1**	**Applicant 2**
Personal loans/hire purchase with more than 6 months to run	£	£
Total monthly payment for any personal loans/hire purchase being cleared on or before completion	£	£
Secured loans with more than 6 months to run	£	£
Total monthly payment for any secured loans being cleared on or before completion	£	£
Deferred purchase agreements with more than 6 months to run	£	£

Total monthly payment for any deferred purchase agreements being cleared on or before completion	£	£
Student loan payment	£	£
Total monthly payment for any student loan being cleared on or before completion	£	£
Childcare	£	£
School fees	£	£
CSA/Maintenance	£	£
Additional costs for financial dependants	£	£
Regular travel	£	£

Outstanding Credit Card Balances	**Applicant 1**	**Applicant 2**
Total outstanding credit card balances	£	£
Credit card balances being cleared on or before completion	£	£

Increase in Outgoings	**Applicant 1**	**Applicant 2**
Are you aware of any changes to your income that is likely to affect your ability to meet your monthly mortgage repayment?	☐ Yes ☐ No	☐ Yes ☐ No
If yes provide details		

Annual Property Outgoings	**Applicant 1**	**Applicant 2**
Enter details of cost associated with property you are buying		
Council Tax	£	£
Ground Rent	£	£
Service Charge	£	£
Building Insurance	£	£
Shared Ownership Rent	£	£

12. Existing Mortgage Details	**Applicant 1**	**Applicant 2**
Which applicant is party to this mortgage?	☐ Yes ☐ No	☐ Yes ☐ No
Existing lender name		
Existing mortgage account number		
What is your current outstanding balance?	£	£
What is the balance that will be continuing?	£	£
Of this continuing balance, how much is interest only?	£	£
Is the property let?	☐ Yes ☐ No	☐ Yes ☐ No
Is there a tenancy agreement in place?	☐ Yes ☐ No	☐ Yes ☐ No
What is the monthly mortgage repayment?	£	£
What is the monthly rental income?	£	£
Remaining Mortgage Term	**Years:** **Months:**	**Years:** **Months:**
Which applicant is party to this mortgage?	☐ Yes ☐ No	☐ Yes ☐ No
Existing lender name		
Existing mortgage account number		
What is your current outstanding balance?	£	£
What is the balance that will be continuing?	£	£
Of this continuing balance, how much is interest only?	£	£
Is the property let?	☐ Yes ☐ No	☐ Yes ☐ No
Is there a tenancy agreement in place?	☐ Yes ☐ No	☐ Yes ☐ No
What is the monthly mortgage repayment?	£	£
What is the monthly rental income?	£	£
Remaining Mortgage Term	**Years:** **Months:**	**Years:** **Months:**

	Applicant 1	Applicant 2
Which applicant is party to this mortgage?	☐ Yes ☐ No	☐ Yes ☐ No
Existing lender name		
Existing mortgage account number		
What is your current outstanding balance?	£	£
What is the balance that will be continuing?	£	£
Of this continuing balance, how much is interest only?	£	£
Is the property let?	☐ Yes ☐ No	☐ Yes ☐ No
Is there a tenancy agreement in place?	☐ Yes ☐ No	☐ Yes ☐ No
What is the monthly mortgage repayment?	£	£
What is the monthly rental income?	£	£
Remaining Mortgage Term	Years: Months:	Years: Months:

13. Existing Mortgage (Interest Only)	Applicant 1	Applicant 2
How have you chosen to repay your existing mortgage?	☐ Repayment	☐ Repayment
	☐ Investment backed (interest only)	☐ Investment backed (interest only)
	☐ Part investment backed, part repayment	☐ 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	☐ New ISA
	☐ New endowment policy	☐ New endowment policy
	☐ New pension plan	☐ New pension plan
	☐ Existing ISA	☐ Existing ISA
	☐ Existing endowment policy	☐ Existing endowment policy
	☐ Existing pension plan	☐ Existing pension plan
	☐ Sale of second property	☐ Sale of second property
	☐ Sale of main residence	☐ Sale of main residence
Estimated second property value?	£	£
Are all persons named on this repayment strategy also applicants for this borrowing application?	☐ Yes ☐ No	☐ Yes ☐ No
If the endowment/pension/ISA is linked, please list the policies to be used:	Policy provider:	Policy provider:
	Policy start date:	Policy start date:
	Policy maturity date:	Policy maturity date:
	Latest estimated maturity value: £	Latest estimated maturity value: £
	Monthly cost: £	Monthly cost: £

14. Credit Check	Applicant 1	Applicant 2
Have you ever been bankrupt or entered into a voluntary agreement with a creditor in the last 6 years?	☐ Yes ☐ No	☐ Yes ☐ No
Details of bankruptcy or arrangements with creditors		
Have you ever had a county court judgement against you?	☐ Yes ☐ No	☐ Yes ☐ No
Have you ever had a property repossessed?	☐ Yes ☐ No	☐ Yes ☐ No

Please be aware that a Decision In Principle will leave a soft footprint against the applicant(s) credit record

15. Product Selection

All existing borrowing (i.e. the amount being ported) will be kept on the existing repayment type and if any part of it is on interest only you must have acceptable repayment vehicle(s) in place. All further borrowing must be taken on a capital and interest repayment basis.

Single product selection	
Product description	☐ Fixed ☐ Tracker
Product term	☐ 2 year ☐ 3 year ☐ 5 year
Product code	
Product fee	☐ Add to loan ☐ Pay up front

16. Fee Payment

Booking Fee

Credit / Debit card details will be required for all fees paid upfront

17. Landlord / Letting Agent Details

Name	
Building name	
Building number	
Flat	
Street	
District	
Town	
County	

18. Applicant's Contact Details

	Applicant 1	Applicant 2
What is the applicant's preferred method of contact?	☐ Home ☐ Work ☐ Mobile ☐ Email	☐ Home ☐ Work ☐ Mobile ☐ Email
Home telephone number		
Work telephone number		
Mobile phone number		
Email address		
Do you prefer contact through Typetalk?	☐ Yes ☐ No	☐ Yes ☐ No
Do you prefer to receive your correspondence in a special format?	☐ None required ☐ Audio ☐ Large print ☐ Braille	☐ None required ☐ Audio ☐ Large print ☐ Braille
If the applicant prefers either Typetalk or special correspondence, please tell them we'll only use this information to help complete what they've asked us to do (which may also include sharing it with other organisations that act on our behalf).		
Does the applicant(s) have a different correspondence to their current address?	☐ Yes ☐ No	☐ Yes ☐ No
If yes – Building name		
Building number		
Flat		
Street		
District		
Town		
County		
Postcode		
Telephone number		

19. Existing Mortgage Details

Existing lender name		
Existing mortgage account number		
Outstanding balance	£	£
Balance continuing	£	£
Existing lender name		
Existing mortgage account number		
Outstanding balance	£	£
Balance continuing	£	£

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20. Existing Personal Loans/ Hire Purchase

	Applicant 1	Applicant 2
Which applicant is party to this loan?	☐	☐
Lender name		
Monthly payment	£	£
Approximate balance	£	£

	Applicant 1	Applicant 2
Which applicant is party to this loan?	☐	☐
Lender name		
Monthly payment	£	£
Approximate balance	£	£

21. Existing Secured Loans

	Applicant 1	Applicant 2
Which applicant is party to this loan?	☐	☐
Lender name		
Monthly payment	£	£
Approximate balance	£	£

	Applicant 1	Applicant 2
Which applicant is party to this loan?	☐	☐
Lender name		
Monthly payment	£	£
Approximate balance	£	£

22. Existing Deferred Purchase Agreements

	Applicant 1	Applicant 2
Which applicant is party to this loan?	☐	☐
Lender name		
Monthly payment	£	£
Approximate balance	£	£

	Applicant 1	Applicant 2
Which applicant is party to this loan?	☐	☐
Lender name		
Monthly payment	£	£
Approximate balance	£	£

23. Existing Credit Card Balances

	Applicant 1	Applicant 2
Which applicant is party to this credit card?	☐	☐
Company name		
Monthly payment	£	£
Balance being cleared	£	£

	Applicant 1	Applicant 2
Which applicant is party to this credit card?	☐	☐
Company name		
Monthly payment	£	£
Balance being cleared	£	£

24. Employment Details

	Applicant 1	Applicant 2
Company/business name		
Building number		
Building name		
Floor/unit/flat		
Street		
Town		
County		
Postcode		

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Accountants Details	Applicant 1	Applicant 2
Name		
Telephone number		
E-mail address		
Building number		
Building name		
Floor/unit/flat		
Street		
Town		
County		
Postcode		

Secondary Employment details	Applicant 1	Applicant 2
Company/business name		
Building number		
Building name		
Floor/unit/flat		
Street		
Town		
County		
Postcode		

Accountants Details	Applicant 1	Applicant 2
Name		
Telephone number		
E-mail address		
Building number		
Building name		
Floor/unit/flat		
Street		
Town		
County		
Postcode		

25. Bank Details

Bank details will be required for the payment of the mortgage

Sort code ☐☐ ☐☐ ☐☐

Account number ☐☐☐☐☐☐☐☐

Date of payment ☐☐ Direct Debits are usually collected on 1st of the month unless you ask for a different day (2-28).

26. Details of property to be mortgaged (if not already completed in section 2)

Is the mortgage for the applicants existing residence?	☐ Yes ☐ No	☐ Yes ☐ No
House number		
House name		
Flat		
Street		
Town		
County		
Postcode		

Which area of the UK is the property in? ☐ England & Wales ☐ Northern Ireland ☐ Scotland

Region of the security address e.g. South West, North East, Greater London

Tenure ☐ Freehold ☐ Commonhold ☐ Leasehold ☐ Ownership Scotland

If Leasehold, how many years remaining on the lease?

What will the new or extended term of the lease be at the time of completion?

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27. Property Description

What is the property type?	☐ Terraced house ☐ Semi detached house ☐ Detached house ☐ Terraced bungalow
	☐ Semi detached bungalow ☐ Converted flat / maisonette ☐ Purpose built flat / maisonette
What year was the property built?	Y Y Y Y
Number of bedrooms	
How many floors does the property have?	
Purchase only – Is the property a new build, newly converted or refurbished?	☐ Yes ☐ No
Does the property have a garage or parking space?	☐ Yes ☐ No
Does the property have a basement or cellar?	☐ Yes ☐ No
Is the property under construction or major redevelopment? (or due to be)	☐ Yes ☐ No
Is the property a listed building?	☐ Yes ☐ No
Is the property habitable?	☐ Yes ☐ No
Is the plot size greater than 1 acre?	☐ Yes ☐ No
If plot size is greater than 1 acre, will any of the land be used for business/ commercial/ agricultural purposes?	☐ Yes ☐ No
Is the property subject to any agricultural restrictions?	☐ Yes ☐ No
If plot size is greater than 1 acre please provide details of agricultural restrictions	
Is the wall construction brick, block or stone?	☐ Yes ☐ No
Is the roof construction tile or slate?	☐ Yes ☐ No
Has the property been flooded in the last 5 years?	☐ Yes ☐ No
Is the property at risk of coastal or river erosion?	☐ Yes ☐ No
Has the property suffered from subsidence, heave or landslip?	☐ Yes ☐ No
Have significant structural alterations been made to the property that are not visible from the road?	☐ Yes ☐ No

28. Valuation Details

Please select the valuation type you require ☐ Mortgage Valuation Report ☐ Home Survey Level 2 Report ☐ Transcript (Scotland only)

Credit / Debit card details may be required for payment of fees

Property Access Details (Details of Estate Agent or other)

Contact name ______

Estate Agent (if applicable) ______

Primary Contact Number ______

Secondary Contact Number ______

Please provide any other information that might help us when booking the valuation or gaining access to the property ______

Property Access Address (Details of Property)

Building number ______

Flat ______

Building name ______

Street ______

Town ______

County ______

Postcode ______

29. Other Occupants
Any persons aged 17 or over that will be living at the property on completion of this mortgage

Title ______ ______

Forename ______ ______

Surname

Title ______ ______

Forename ______ ______

Surname

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30. Solicitor Details

Company name	
Building number	
Building name	
Street	
Town	
County	
Postcode	
Acting solicitor name	
Telephone number	
Email address	

31. Intermediary Requirements

Level of advice	☐ Advice given	
Will you be charging your client a fee?	☐ Yes	☐ No
If yes – fee amount	£	
Who is it payable to?		
When is the fee payable?	☐ Immediately	☐ On application
Is the fee refundable?	☐ Yes	☐ No
Amount of fee to be refunded	£	
Percentage fee of be refunded		%
When is the fee to be refunded if the application does not proceed?		
Do you intend to pass any of the procuration fee to the applicants?	☐ Yes	☐ No
How much of the procuration fee is to be passed on?	£	

32. Additional Information

Please provide any additional notes to support this application

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.

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