



Client Names:	
Application Type:	
Regulated / Non-Regulated:	
Mortgage Type:	
Purpose of Loan:	
Purchase Price / Estimated Value	
Loan Amount	
Term Required	
Repayment Type	
Deposit Amount	
Deposit Source	

Section 1 : Applicant Details		
	Applicant 1	Applicant 2
Title:		
Forename:		
Middle name:		
Surname:		
Maiden / Previous Name:		
Date of Name Change:		
Date of Birth:		
Home Tel. no:		
Work Tel. no:		
Mobile no:		
Email address:		
Who do you bank with?		
Time with bank:		

Marital Status:		
No. of Dependents		
Dependents Names and DOB:		
Anticipated Retirement Age:		
State Retirement Age:		
Are you a smoker?		
Gender:		
Nationality:		
Date of Arrival in the UK:		
Visa Details:		
NI Number:		
Country of Birth:		

If application is made in Limited Company name:

Limited Company Name:	
Company Registration Number:	
Trade / Business Type:	
Number of Director/Shareholders:	

Section 2 : Applicant Address Details

	Applicant 1	Applicant 2
Current Residential Address:		
Town:		
County:		
Postcode:		
Country:		

Date moved in:		
Current Residential status:		

If you have been at your current address for less than 3 years, please provide your previous residential address below

Previous Address Details

	Applicant 1	Applicant 2
Previous Address:		
Town:		
County:		
Postcode:		
Country:		

Date moved in:		
Previous Residential status:		

Previous Address Details		
	Applicant 1	Applicant 2
Previous Address:		
Town:		
County:		
Postcode:		
Country:		

Date moved in:		
Previous Residential status:		

Section 3 : Current Employment Details		
	Applicant 1	Applicant 2
Job Title / Occupation:		
Employment Status:		
Employers Name:		
Employment address:		
Town:		
County:		
Postcode:		
Country:		

Gross annual Income:	£	£
Bonus Amount:	£	£
Bonus Guaranteed:		
Bonus Frequency:		
Overtime Amount:	£	£
Overtime Guaranteed:		
Overtime Frequency:		
Allowance Amount	£	£
Allowance Guaranteed:		
Allowance Frequency:		

Section 3 : Employed Details		
	Applicant 1	Applicant 2
Commence Date:		
Employment Type:		
Are you on probation?		
Probation Details:		

Contact for References:		
Email for References:		
Phone number for references:		

Is any income paid in foreign currency?		
If yes, please provide details:		

Self Employed Details		
	Applicant 1	Applicant 2
Years Self Employed:		
Company Type:		
Percentage of Business owned:		
Salary:	£	£
Dividends:	£	£
Turnover:	£	£

Net Profit Year 1	£	£
Net Profit Year 2	£	£
Net Profit Year 3	£	£

Are Accounts Available?		
Accountant Name:		
Accountant Qualification:		

Other Income:		
	Applicant 1	Applicant 2
Income:		
Income Source:		
Income Start Date:		
Contractor Income:		
	Applicant 1	Applicant 2
Contract Start Date:		
Contract End Date:		
Time Contracting:		
Day Rate:	£	£

Income Notes:

Section 4 : Current Mortgage Details

					%		£	£	
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Section 6 : Credit History Details

Applicant 1			
Have you ever had any defaults in the last 6 year?			No
Company	Amount	Date Registered	Date Satisfied
	£		
	£		
	£		
	£		

Applicant 2			
Have you ever had any defaults in the last 6 year?			
Company	Amount	Date Registered	Date Satisfied
	£		
	£		
	£		
	£		

Applicant 1			
Have you ever had any CCJ in the last 6 year?			No
Company	Amount	Date Registered	Date Satisfied
	£		
	£		
	£		
	£		

Applicant 2			
Have you ever had any CCJ in the last 6 year?			
Company	Amount	Date Registered	Date Satisfied
	£		
	£		
	£		
	£		

Applicant 1						
Have you any missed payments on commitments in the last 5 years?						No
Commitment Type	Company	Date Cleared	Missed Payments in last (months)			
			3	12	24	36

Applicant 2						
Have you any missed payments on commitments in the last 5 years?						
Commitment Type	Company	Date Cleared	Missed Payments in last (months)			
			3	12	24	36

Applicant 1		
Have you had a property repossessed?		No
Company	Date Registered	Date Satisfied

Applicant 2		
Have you had a property repossessed?		
Company	Date Registered	Date Registered

Applicant 1	
Have you ever been Bankrupt?	No

Applicant 2	
Have you ever been Bankrupt?	

			£	£	£	£						
			£	£	£	£						
			£	£	£	£						

Section 8 : Mortgaged Property Details

House Name or Number:			
Street:			
City:			
County:			
Postcode:			
Country:			
Tenure:		If Leasehold – years remaining	
Property Type:		Year Built:	
House Type:		Storeys in building:	
Flat Type:		Charge Type:	

Accommodation Details

Bedrooms:		
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If Flat / maisonette:

Floors in block:		Units in Block:	
Floors of property:		Is there a lift?	

Construction Type:

Standard Construction:		New-Build?	
Ex-Local Authority:		Annexe?	

Is the property on the market?	
Is property near commercial premises?	
If Yes, what type of commercial premises?	
Is this property being purchased from the council with this application?	
Will the property be owner occupied?	
If no, please provide details:	
Is the property rented out/to be rented out?	

Please provide details of any other occupiers over the age of 17, not on this application

Name:		Age:		Relationship:	
Name:		Age:		Relationship:	
Name:		Age:		Relationship:	
Name:		Age:		Relationship:	

Valuation / Access Details

Valuation type:	
Contact for Access:	
Contacts Name:	
Daytime Telephone Number:	
Mobile Telephone Number:	

Notes, including; direct debit details for mortgage payments and insurance plan payments

Section 10 : Solicitor Details

Solicitor Name:			
Building Name or Number:			
Street:			
City:			
County:			
Postcode:			
Country:			
Phone Number:		Fax number:	
DX Number:		No. of Partners in firm:	
Contact Name:		Email Address:	

Section 11 : Accountant Details

Accountants Name:			
Building Name or Number:			
Street:			
City:			
County:			
Postcode:			
Country:			
Phone Number:		Fax number:	
Qualifications:			

Section 12: Budget Planner

Household Income

Applicant 1 Net Monthly Income:	£	Applicant 2 Net Monthly Income:	£
Part Time Income:	£	Jobseekers Allowance:	£

Child Benefit:	£	Tax Credits:	£
Working Tax Credits:	£	Maintenance Income:	£
Pension Income:	£	Other Benefits:	£
		Total Income:	£

Debt Repayments (Monthly)	
Mortgage	£
Second Mortgage	£
Shared Ownership Rental	£

Priority Debt (Monthly)	
Mortgage Arrears	£
Gas Arrears	£
Maintenance Arrears	£
Defaults	£
CCJs	£
Debt Management Plans	£
Magistrate Court Fines	£
Council Tax Arrears	£
Car Finance	£

Unsecured Borrowing	
Credit Cards	£
Loans	£
Overdrafts	£
Store Cards	£
Student Loans	£
Other Borrowing	£

Total Debt Repayments	£
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Living Costs (Monthly)	
Electricity	£
Gas	£
Water	£
Landline/Mobile Phone	£
TV Licence	£
Council Tax	£
Ground Rent / Service Charge	£
Mortgage Payment Protection	£
Endowment	£

Pension Contribution	£
Childcare Costs	£
Maintenance	£
Food	£
Car Maintenance	£
Fuel	£
TV Broadband	£
Recreation/Holidays/discretionary spend	£
Clothing	£
Medical Expenses	£
Other Living Costs	£

Insurance Costs (Monthly)	
Motor Insurance	£
Health Insurance	£
Payment Protection	£
Life Insurance	£
Dental Insurance	£
Buildings and Contents	£
Other Insurance	£
Total Living Costs	£

Total Household Income	£
Total Debt Repayments	£
Total Living Costs	£

Available Income:	£
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Section 15: Your Needs

Do you Anticipate any changes to your income or expenditure in the next 5 years?	
Please Provide details	
How would it affect your household if your monthly payments increased significantly?	
What is your attitude to risk?	
Low (you prefer certainty of repayment)	
Medium (You prefer a mixture of repayment & interest only)	
High (You don't need certainty of repayment and can risk interest only)	
Do you want the certainty of your mortgage being repaid at the end of the term?	
Would you prefer the lender fees to be paid upfront or add them to the loan?	
Do you understand you will pay interest on this sum over the full mortgage term?	
Are you consolidating other debts within this mortgage?	
Do you understand this could increase the overall amount you pay back in the long term? (with respect to the debts being consolidated within this mortgage)	
Do you understand the implications of securing previously unsecured debts against your property?	
Do you intend to make Early Repayments or Overpayments?	
How Much and when?	

Do you require a mortgage with No Early Repayment Charges?	
Would you prefer your monthly payments to remain stable for a period of time?	
Over what period and why?	
Do you intend to move or sell the property in the foreseeable future?	
Please provide details	
Please provide a reason for the term length requested	
Does the term requested take your mortgage past the state retirement age?	
How do you intend to continue paying the mortgage after this date?	
Reason Why	
Do you require a Lender who can process this mortgage as quickly as possible?	
Reason Why	
Other Mortgage Requirements	
Have you made a will?	
Can we arrange for someone to contact you regarding creating a Will?	
Do you understand the potential for future interest changes?	
Are you looking to minimise your monthly payments? (Interest Only/Long Term Product)	
Reason Why	
Do you have an ideal budget in mind for your monthly repayments?	
Please provide details:	
Are you likely to receive a lump sum enabling you to pay off capital at all?	
Are you planning on clearing the loan early?	
How are you planning to do so?	
Do you want the ability to vary your repayments or take a repayment holiday?	
Reason Why	

Existing Provisions

Policy Type	Provider	Reference	Sum Assured	Premium
			£	£
Payment Type	Person Assured	Remaining Term	Accidental Damage Covered?	Personal Possessions Covered?
In Trust?	Guaranteed / Reviewable	Waiver or Premium	Policy Start Date	Renewal Date

Will this policy be cancelled?	Reason for Policy Cancellation;

Policy Type	Provider	Reference	Sum Assured	Premium
			£	£
Payment Type	Person Assured	Remaining Term	Accidental Damage Covered?	Personal Possessions Covered?
In Trust?	Guaranteed / Reviewable	Waiver or Premium	Policy Start Date	Renewal Date
Will this policy be cancelled?	Reason for Policy Cancellation;			




Policy Type	Provider	Reference	Sum Assured	Premium
			£	£
Payment Type	Person Assured	Remaining Term	Accidental Damage Covered?	Personal Possessions Covered?
In Trust?	Guaranteed / Reviewable	Waiver or Premium	Policy Start Date	Renewal Date
Will this policy be cancelled?	Reason for Policy Cancellation;			

Policy Type	Provider	Reference	Sum Assured	Premium
			£	£
Payment Type	Person Assured	Remaining Term	Accidental Damage Covered?	Personal Possessions Covered?
In Trust?	Guaranteed / Reviewable	Waiver or Premium	Policy Start Date	Renewal Date
Will this policy be cancelled?	Reason for Policy Cancellation;			

Policy Type	Provider	Reference	Sum Assured	Premium
			£	£
Payment Type	Person Assured	Remaining Term	Accidental Damage Covered?	Personal Possessions Covered?

In Trust?	Guaranteed / Reviewable	Waiver or Premium	Policy Start Date	Renewal Date
Will this policy be cancelled?		Reason for Policy Cancellation;		

Policy Type	Provider	Reference	Sum Assured	Premium
			£	£
Payment Type	Person Assured	Remaining Term	Accidental Damage Covered?	Personal Possessions Covered?
In Trust?	Guaranteed / Reviewable	Waiver or Premium	Policy Start Date	Renewal Date
Will this policy be cancelled?		Reason for Policy Cancellation;		

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