



Brokers Name		Company Name	
Tel No		Email	

Product type: Please delete as appropriate		
House Purchase / Re-mortgage	First Time Buyers	Yes / No
Residential / Investment	Individual	Ltd Co (SPV)
Product Required:		

Applicant Details	Applicant One	Applicant Two
Title		
Forename		
Middle Name(s)		
Surname		
Date of Birth	/ /	/ /
NI Number		
Number of Dependants		
Previous name & date of name change		
Home Tel No		
Mobile No		
Nationality		
Marital Status	Married / Single / Separated / Divorced / Widowed	Married / Single / Separated / Divorced / Widowed
Current Address (inc postcode)		
Date moved to address	/ /	/ /
Previous addresses (inc postcode) (need 3yr history)		
Date moved to address	/ /	/ /
Residential status at current address	Owner / Tenant – furnished / tenant – unfurnished / living with relatives	Owner / Tenant – furnished / tenant – unfurnished / living with relatives
UK Residents	Yes / No	Yes / No

Existing Mortgage details			
Lender		Monthly payment	£
Amount Outstanding £		To be repaid?	
Confirm number of months in arrears (if any)		If no, why?	

Loan Details - please confirm source of deposit – Re-mortgage, Savings, Inheritance etc			
Loan Amount	£	Term (yrs)	Rental Income £
Purchase Price	£	Estimated value (if re-mortgage)	£
Property Location	England / Mainland Scotland / Wales		

Employment Details		
Employment Type	Employed / Self Employed / Retired / House Person / Student / Unemployed	Employed / Self Employed / Retired / House Person / Student / Unemployed
Occupation		
Name of Business		
Is the position Permanent	Yes / No	Yes / No
Start date of employment & if Self-Employed % of share holding		
Annual income, please detail commission, bonuses etc & any other income (ie rental)	£	£

Finance Details		
Cheque card	Yes / No	Yes / No
Card Types	Number of each type	Number of each type
MasterCard		
Visa Card		
Amex Card		
Diners Card		
Store Card		
Other...		
Current Account	Yes/No	Time with bank yrs

Commitments (if more please send additional page)			
Type (credit card, loan)		Amount o/s	£
Lender		Monthly payment	£
Intend to re-pay on completion? Yes/No			
Type (loan, HP)		Amount o/s	£
Lender		Monthly payment	£
Intend to re-pay on completion? Yes/No			

Please provide full details of existing property portfolio (use separate sheet if necessary)				
Address	Lender	Value £	Mort o/s £	Rental Income £

Declaration
<p>I am authorised to act as an agent on behalf of all applicants in connection with this mortgage enquiry. I confirm that I have explained the contents of this document and obtained verbal consent from the applicant(s) in relation to the processing of their personal information.</p> <p>The applicant(s) are aware that:</p> <p>(a) For the purposes of this enquiry a credit reference search will be undertaken. When undertaking a joint enquiry these credit reference agencies will link together information from financial records of their financial partners, unless a notice of separation (known as 'disassociation') is filed. Where the enquirer is a sole applicant it will be assessed with reference to linked information about one or more financial partners.</p> <p>(b) Where a search and/or disclosure is made to a credit reference agency records may be kept. The lender may use a system of credit scoring when assessing applicant(s) suitability (known as 'automated decisioning').</p> <p>(c) The lender and other organisations may use and search the records of fraud prevention agencies to help make decisions about credit related services, and/or on motor, household, credit, life and other insurance proposals and claims for the applicant/s and members of their household, to trace debtors, recover debt, prevent fraud and to manage the applicants accounts or insurance policies and to check the applicant/s identity to prevent money laundering, except where satisfactory proof of identity has been provided.</p> <p>(d) The broker, lender or other third parties may wish to obtain personal information in writing, by telephone, fax or in electronic form from credit reference agencies and other associated companies. The applicant/s are also aware of their rights under the Data Protection Act 1998, that personal information will be recorded and the applicant(s) have a right to obtain a copy on payment of a fee. They are also aware that inaccuracies in this information can be corrected.</p> <p>Signed by the Introducer</p> <p style="text-align: center;">Printed Date</p>