

1. BROKER DETAILS

Broker Name

Company Name

FCA Number

Regulatory Status

Network Name

2. CLIENT DETAILS

Applicant 1 - Details

Full Name

Date of birth

Retirement Age

Mobile Number

Email Address

Nationality

Employment Status

If self employed, how many years Tax Calculations are available?

Gross annual Income £

Applicant 2 - Details

Full Name

Date of birth

Retirement Age

Mobile Number

Email Address

Nationality

Employment Status

If self employed, how many years Tax Calculations are available?

Gross annual Income £

Applicant 3 - Details

Full Name

Date of birth

Retirement Age

Mobile Number

Email Address

Nationality

Employment Status

If self employed, how many years Tax Calculations are available?

Gross annual Income £

Applicant 4 - Details

Full Name

Date of birth

Retirement Age

Mobile Number

Email Address

Nationality

Employment Status

If self employed, how many years Tax Calculations are available?

Gross annual Income £

3. FUNDING

Is the borrower looking for

Property Type

If Buy To Let or HMO, Gross annual rent £

Property address and description

Current Mortgage Balance? £

Amount of borrowing required? £

If borrowing amount is higher than the current mortgage balance, what is the purpose of the additional borrowing?

Repayment Type

If part and part, or interest only, how will the interest only element be repaid?

4. CREDIT HISTORY

Has the applicant had any arrears relating to mortgages/loans/financial agreements in the last 3 years?

 Yes No

If you selected 'Yes' above specify the amount, date registered and if relevant the date it was satisfied:

Has the applicant had any defaults relating to mortgages/loans/financial agreements in the last 3 years?

 Yes No

If you selected 'Yes' above give details:

Has the applicant had a CCJ registered against them in the last 3 years?

 Yes No

If you selected 'Yes' above specify the amount, date registered and if relevant the date it was satisfied:

Has the applicant ever had a property repossessed?

 Yes No

If you selected 'Yes' above specify the amount, date registered and if relevant the date it was satisfied:

Has the applicant entered into any formal agreements with creditors e.g. IVA at any time in the past?

 Yes No

If you selected 'Yes' above specify the amount, date registered and if relevant the date it was satisfied:

Has the applicant ever been declared bankrupt or owned a business which has been placed into liquidation?

 Yes No

If you selected 'Yes' above specify the amount, date registered and if relevant the date it was satisfied:

5. ADDITIONAL NOTES
