

# Intermediary data capture form

(for use with online mortgage application only)



## Approval in principle (AIP)

(fields with a shaded background are needed to produce KFI)

	Applicant 1	Applicant 2
Title		
Forename(s)		
Surname		
House name or number		
Postcode		
Date of birth		
Advance type (purchase/remortgage)		
Residential or BTL		
First Time Buyer	Y/N	
Purchase price/estimate value	£	
What is the total mortgage amount required	£	
Has the customer's name ever changed? If yes, previous name and date changed		
Is this an existing customer?		
Marital status		

## Bank account details

Account name		
Account number		
Sort code (xx-xx-xx)		
Number of years with the bank	YRS	MTHS
Does the customer have a cheque guarantee card?	Y/N	Y/N
Residential status (i.e. owner with mortgage)		

## Address details

Current address and postcode					
If less than 3 years at current address, please give full previous address, postcode and basis on which lived there (e.g. owner with mortgage/tenant)					
Time at current address		YRS	MTHS	YRS	MTHS

## Loan details

Is an existing mortgage being ported? If yes, what is the account number(s) for the mortgage (please refer to the porting section on our website)					
Loan amount	£			£	
Term		YRS	MTHS	YRS	MTHS
Type (repayment/interest only)					

## Product required

Total loan amount	£			£	
Term		YRS	MTHS	YRS	MTHS
Type (repayment/interest only)					

## Employment details

Status (employed/self employed/retired)			
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## Employed

Employer					
Employers address and postcode					
Length of service		YRS	MTHS	YRS	MTHS

If less than 3 years in current job, please provide previous employment details		
Employment basis (e.g. permanent)		
If fixed term contract, what is the end date?		
Basic income per annum	£	£

### Self employed

Company name, address and postcode		
Number of years and months established	YRS	MTHS
Latest business year for self employment (yyyy format)		
Latest net profit	£	£
Income type (salary/divident/net profit)		
Income amount p.a.	£	£

### Other income

Other sources of income p.a. (e.g. tax credits, pensions, maintenance/other)		
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### Property details

Type (e.g. detached house)	
Property use	
Tenure (freehold/leasehold)	
If BTL application, rental income per month	£

Property address and postcode (to be mortgaged)		
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## Expenditure

<b>1.</b> Type (i.e. credit card/loan)		
Amount per month	£	£
Name of recipient/company to which payments are being made		
Balance outstanding and months remaining	£ MTHS REMAINING	£ MTHS REMAINING
<b>2.</b> Type (e.g. credit card/loan)		
Amount per month	£	£
Name of recipient/company to which payments are being made		
Balance outstanding and months remaining	£ MTHS REMAINING	£ MTHS REMAINING
<b>3.</b> Type (e.g. credit card/loan)		
Amount per month	£	£
Name of recipient/company to which payments are being made	£ MTHS REMAINING	£ MTHS REMAINING
Balance outstanding and months remaining	£ MTHS REMAINING	£ MTHS REMAINING
Amount of credit being consolidated into mortgage		

## Full Mortgage Application (FMA)

### Remortgage details

	Applicant 1	Applicant 2
Current mortgage balance	£	£
Original purchase price	£	£
Original purchase date	£	£

Number of dependants		
Is this customer moving into the property?		
Does the customer own an interest or share in any other property?		
Nationality (UK/EU only acceptable)		
National Insurance Number		
Home telephone number		
Work telephone number		
Mobile telephone number		
Fax number (optional)		
Email address (optional)		

### Lenders details

Lenders name, full address and postcode		
Lenders telephone number		
Lenders fax number		
Mortgage account number		
Monthly repayment amount	£	£
Current outstanding balance	£	£
What date did this mortgage start?		
Is the mortgage being redeemed?	Y/N	Y/N

### Lenders detail (for previous address, if applicable)

Lenders name, full address and postcode		
Lenders telephone number		
Lenders fax number		
Mortgage account number		

Monthly repayment amount		
Current outstanding balance	£	£
What date did the mortgage start?		
Are the correspondence and current address the same? If no, please provide correspondence address details including postcode		
Does the customer own any other properties? If yes, please provide full address and postcode		
Property type		
Proportion of property owned by customer		

### Borrowing requirements

Repayment vehicle (we only need details if interest only)	
How is the deposit being paid?	
<b>If remortgage</b> , purpose of loan Is there more than one purpose for the loan (e.g. straight remortgage plus capital raising)	
Part 1 - loan purpose	£
Part 2 - loan purpose	£

### Employment details

Nature of business		
Current position		
Employers telephone number		
Employers fax number		

### Self employed details

Nature of business		
Telephone number		
Fax number		

Previous business year (yyyy)		
Previous business year profit	£	£
Business year 3 (yyyy)		
Business year 3 profit	£	£

### Accountant details

Accountant name				
Accountant address and postcode				
Accountant telephone number				
Accountant fax number				
Accountant qualification				
Number of years with accountant	YRS	MTHS	YRS	MTHS

### Property occupancy

<p>Apart from the customer, will anyone else over the age of 17 occupy the property? If yes, please provide full name, DOB and relationship to the customer</p>		
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### Property details

Wall and roof type (i.e. brick and tile)	
Year built	
Number of storeys	
Number of bedrooms	
Number of bathrooms	
Number of kitchens	
Number of living rooms	
Property class	Residential or Business (BTL)
Ground rent	£
Service charge	£
Unexpired term of lease	

Is the property a self build?	
Is the property over commercial premises?	
Is the property being bought from a relative?	
Warrant type code for new properties i.e. NHBC	
Viewing arrangements	
Person or company to contact - please provide full address	
Contact phone numbers	
Access arrangements	
Type of valuation needed (mortgage valuation/home buyers)	
If using own solicitors, please provide full name, address and contact telephone number	



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