

Mortgage Application

(3-parts)



Part 1 - Personal Information

Part 2 - Property Details

Part 3 - Declaration

Section 1

Your Personal Details

	First Applicant	Second Applicant
1 Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>
2 Surname	<input type="text"/>	<input type="text"/>
3 Forename(s)	<input type="text"/>	<input type="text"/>
4 Have you ever been known by another name?	No <input type="checkbox"/> Yes <input type="checkbox"/> If Yes, please state Name <input type="text"/> Date of change <input type="text"/>	No <input type="checkbox"/> Yes <input type="checkbox"/> If Yes, please state Name <input type="text"/> Date of change <input type="text"/>
5 Age and date of birth	Age <input type="text"/> Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>	Age <input type="text"/> Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>
6 Marital status	Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Other (specify) <input type="text"/>	Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Other (specify) <input type="text"/>
No of financial dependants	<input type="text"/> Ages <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> Ages <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
7 Nationality	<input type="text"/>	<input type="text"/>
How long resident in the UK?	<input type="text"/> years	<input type="text"/> years
8 Do you have savings with the Society (If yes, please state the account number)	No <input type="checkbox"/> Yes <input type="checkbox"/> <input type="text"/>	No <input type="checkbox"/> Yes <input type="checkbox"/> <input type="text"/>
9 Current address (include Postcode)	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
10 Telephone number(s) inc. dialling code	Home <input type="text"/> Work <input type="text"/> Mobile <input type="text"/>	Home <input type="text"/> Work <input type="text"/> Mobile <input type="text"/>

	First Applicant	Second Applicant
11 E-mail address	<input type="text"/>	<input type="text"/>
12 Occupancy type	Owner with mortgage <input type="checkbox"/> Owner without mortgage <input type="checkbox"/> Tenant <input type="checkbox"/> With relatives <input type="checkbox"/> Other (specify) <input type="text"/>	Owner with mortgage <input type="checkbox"/> Owner without mortgage <input type="checkbox"/> Tenant <input type="checkbox"/> With relatives <input type="checkbox"/> Other (specify) <input type="text"/>
13 Are you a first time buyer?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
14 When did you move in to your current address?	Day <input type="text"/> <input type="text"/> Month <input type="text"/> <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Day <input type="text"/> <input type="text"/> Month <input type="text"/> <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
15 Details of your previous address if less than 3 years at current address	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
16 Where there is a guarantor, insert name and address	Name <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	Name <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>

Section 2

Income & Occupation Details

17 Occupancy type at previous address	Owner with mortgage <input type="checkbox"/> Owner without mortgage <input type="checkbox"/> Tenant <input type="checkbox"/> With relatives <input type="checkbox"/> Other (specify) <input type="text"/>	Owner with mortgage <input type="checkbox"/> Owner without mortgage <input type="checkbox"/> Tenant <input type="checkbox"/> With relatives <input type="checkbox"/> Other (specify) <input type="text"/>
18 Date you moved into your previous address	Day <input type="text"/> <input type="text"/> Month <input type="text"/> <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Day <input type="text"/> <input type="text"/> Month <input type="text"/> <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

If you have had more than one previous address in the last 3 years, give full details in Section 9 (as detailed in Q15, Q17 and Q18).

19 National Insurance No.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
20 Tax reference	<input type="text"/>	<input type="text"/>
21 Are you employed or self-employed?	Employed <input type="checkbox"/> Go to Q22 Self-employed <input type="checkbox"/> Go to Q28 Other <input type="checkbox"/> Provide details in Section 9	Employed <input type="checkbox"/> Go to Q22 Self-employed <input type="checkbox"/> Go to Q28 Other <input type="checkbox"/> Provide details in Section 9

Section 3

Employed Applicants

It is important to provide accurate information concerning your income to prevent over commitment in respect of mortgage payments. The Society reserves the right to carry out referencing and require independent evidence of income.

	First Applicant	Second Applicant
22 Annual basic income	£ <input type="text"/>	£ <input type="text"/>
Regular bonus, overtime or commission	£ <input type="text"/>	£ <input type="text"/>
Any other income	£ <input type="text"/>	£ <input type="text"/>
Source of any other income	<input type="text"/>	<input type="text"/>
Total annual income	£ <input type="text"/>	£ <input type="text"/>
23 Nature of employment	Permanent <input type="checkbox"/> Contract <input type="checkbox"/> Part-time <input type="checkbox"/> Full-time <input type="checkbox"/>	Permanent <input type="checkbox"/> Contract <input type="checkbox"/> Part-time <input type="checkbox"/> Full-time <input type="checkbox"/>
24 Occupation	<input type="text"/>	<input type="text"/>
25 Name and address of employer	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
26 Is the location of your employment different from the details in Q25?	No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, give full details in Section 9	No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, give full details in Section 9
27 Date employment commenced	Day <input type="text"/> <input type="text"/> Month <input type="text"/> <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Day <input type="text"/> <input type="text"/> Month <input type="text"/> <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

If less than 12 months, use **Section 9** to answer **Q24**, **Q25**, **Q26** and **Q27** for each employer, including family interests, during the last 36 months and state the probable period details for your current employer.

Section 4

Self-Employed Applicants (inc. Company Directors with at least a 25% shareholding)

Please complete all boxes, enter nil if applicable. It is important to provide accurate information concerning your income to prevent over commitment in respect of mortgage payments. The Society reserves the right to carry out referencing and require independent evidence of income.

	First Applicant	Second Applicant
28 Your share of net profits from the last 3 years' trading (if you are a share holding director, please confirm total remuneration including dividends)	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> £ <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> £ <input type="text"/>	Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> £ <input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> £ <input type="text"/>

	First Applicant	Second Applicant
29 Nature of business and length of time trading under your control. If less than 2 years, please give details of previous trading/occupation in Section 9	<input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
30 Trading name, address and telephone number (including dialling code)	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/> Tel <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/> Tel <input type="text"/>
31 Accountant's contact name, company name, address and telephone number (including dialling code)	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/> Tel <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/> Tel <input type="text"/>
Accountant's qualification	<input type="text"/>	<input type="text"/>

Section 5

Financial Details

	First Applicant	Second Applicant
32 Savings and investment account details	Type <input type="text"/> Product Provider <input type="text"/> Value <input type="text"/> £ <input type="text"/>	Type <input type="text"/> Product Provider <input type="text"/> Value <input type="text"/> £ <input type="text"/>
33 Current account details, bank/building society name and address	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
Account name	<input type="text"/>	<input type="text"/>
Account number	<input type="text"/>	<input type="text"/>
Sort code	<input type="text"/>	<input type="text"/>
34 Have you ever:		
a missed any payments on any credit, rental or mortgage agreement?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>

	First Applicant	Second Applicant
b had a default or court judgement registered against you?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
c been bankrupt, insolvent or made an arrangement with creditors such as an IVA (Individual Voluntary Arrangement) or is such action pending?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
d had a property taken into possession voluntarily or otherwise by a lender?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
e had any application for a mortgage or credit refused?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
f been convicted of, or charged with any offence other than a minor driving offence?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>

If the answers to any of the above questions is yes, please give full details in **Section 9**.

Section 6

Mortgage and/or Tenancy Details

Please complete if you are currently or have been either, a homeowner with a mortgage, or a tenant within the last 12 months.

	First Applicant	Second Applicant
35 Current lender/landlords name and address (if you have a previous landlord, please provide details in Section 9)	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
36 Details of current mortgage:		
Account number	<input type="text"/>	<input type="text"/>
Start date of mortgage	<input type="text"/>	<input type="text"/>
Balance outstanding	£ <input type="text"/>	£ <input type="text"/>
Term remaining	<input type="text"/> Years	<input type="text"/> Years
37 Is there an Early Repayment Charge?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, how much is it?	£ <input type="text"/>	£ <input type="text"/>
What date does it end?	<input type="text"/>	<input type="text"/>
Is it portable to a new property?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

	First Applicant	Second Applicant																														
38 Monthly mortgage or rental payment	£ <input type="text"/>	£ <input type="text"/>																														
39 Is the property to be sold when you take out this mortgage?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>																														
If yes, what is the selling price?	£ <input type="text"/>	£ <input type="text"/>																														
What is the total cost involved in moving (e.g. legal and estate agency fees, stamp duty, removals and possible Early Redemption Charge)?	£ <input type="text"/>	£ <input type="text"/>																														
If no, please give an estimated value and explain how the property will be used in Section 9	£ <input type="text"/>	£ <input type="text"/>																														
40 Repaid mortgages - if you have held other mortgages during the last 5 years, please indicate the name of the lender, the loan amount and the dates they were repaid	<table border="1"> <thead> <tr> <th>Lender</th> <th>Loan Amount £</th> <th>Date Repaid</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>	Lender	Loan Amount £	Date Repaid													<table border="1"> <thead> <tr> <th>Lender</th> <th>Loan Amount £</th> <th>Date Repaid</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>	Lender	Loan Amount £	Date Repaid												
Lender	Loan Amount £	Date Repaid																														
Lender	Loan Amount £	Date Repaid																														

Section 7 **Other Properties**

	First Applicant	Second Applicant
41 Do you currently own or intend to purchase, any other properties at this time? (If no, go to Q46)	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what is the estimated value?	£ <input type="text"/>	£ <input type="text"/>
42 Address of other properties and use (e.g. letting, second property. etc.) Use Section 9 if necessary	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
43 Do you have or intend to have a mortgage in connection with these properties (if no, go to Q46) If yes, please complete Q44 , Q45 and Q46	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

	First Applicant	Second Applicant
44 Name and address of lender	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
45 Account number	<input type="text"/>	<input type="text"/>
Balance outstanding	£ <input type="text"/>	£ <input type="text"/>
46 Is the other property to be sold before completion of this new mortgage?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what is the selling price?	£ <input type="text"/>	£ <input type="text"/>

If you have more than one mortgage on your other properties, please give full details (as outlined in **Q44**, **Q45** and **Q46**) in **Section 9**.

Section 8 Existing or Proposed Commitments

47 Give details of all regular commitments (including guarantor liabilities) such as credit/store cards, loans, overdrafts, hire purchase, maintenance payments, school/university fees and child care costs. Include any proposed additional borrowing from any source other than the Society.

1st/2nd Applicant	Lender	Balance Outstanding £	Purpose	Monthly repayment £	Loan end date	Secured? Yes/No	To be repaid on/or before completion? Yes/No

Continue in **Section 9**, if necessary

Section 9 Additional Details

48 Additional details - please cross reference your answers with the relevant question numbers.

Question number		

