

## RESIDENTIAL & BTL LOAN ENQUIRY

### Borrower & loan type

Individual/s	<input type="checkbox"/>	Business partnership	<input type="checkbox"/>	UK Limited Co.	<input type="checkbox"/>	LLP	<input type="checkbox"/>	Trust	<input type="checkbox"/>
First time buyer	<input type="checkbox"/>	Home mover	<input type="checkbox"/>	2 <sup>nd</sup> /additional home	<input type="checkbox"/>	Letting to buy			<input type="checkbox"/>
Purchase	<input type="checkbox"/>	Refinance	<input type="checkbox"/>	Refinance & capital raise	<input type="checkbox"/>	Capital raise only			<input type="checkbox"/>
Gifted deposit	<input type="checkbox"/>	Help to buy	<input type="checkbox"/>	Local Auth. Right to buy	<input type="checkbox"/>	Shared ownership			<input type="checkbox"/>
BTL / Investment property	<input type="checkbox"/>	First time landlord	<input type="checkbox"/>	Portfolio landlord	<input type="checkbox"/>	Transfer of equity			<input type="checkbox"/>

### The loan details

Total you need to borrow	£	Interest only, amount required	£
Term of the loan needed		Capital repayment, amount required	£
Own funds, for deposit & fees	£	Amount needed to pay existing loans	£
Source of own funds		Target completion date	

#### Purchases

Purchase price	£	Estimated market value*	£
*if different from the purchase price, provide a brief explanation or use notes			

#### Refinance of existing mortgage

Have you approached your existing lender to discuss this loan	<input type="checkbox"/>	Are you seeking further borrowing whilst keeping existing loan	<input type="checkbox"/>
Current market value	£	Existing monthly mortgage payment	£
Current mortgage balance	£	Current interest rate	
Amount paid for the property	£	Penalty for redeeming this mortgage	£
Date the property was purchased		Redemption penalty end date	
Date current mortgage started		Years remaining on the mortgage	
Existing lender		Account number	

#### Additional capital raising purpose

Amount for debt consolidation	£	Amount for Buying other property	£
Amount for property improvements	£	Amount for Property fee & expenses	£

If extra borrowing is for other purposes, please explain below

### Incorporated Ltd Co. LLP Business Details

Ltd Company/LLP name		Company registration no.	
Registered office address		UK incorporated	Yes <input type="checkbox"/> No <input type="checkbox"/>
If SPV, provide SIC numbers			

### Applicant/Director/Partner 1

Title	
Full name	
If shareholder, % held	
Date of birth	
Permanent residential address & postcode	
Date moved in	
Do you own this property	<input type="checkbox"/>
Contact telephone no.	
Email address	
Nationality	
Country of birth	

### Applicant/Director/Partner 2

Title	
Full name	
If shareholder, % held	
Date of birth	
Permanent residential address & postcode	
Date moved in	
Do you own this property	<input type="checkbox"/>
Contact telephone no.	
Email address	
Nationality	
Country of birth	

Applicant/Director/Partner 3		Applicant/Director/Partner 4	
Title		Title	
Full name		Full name	
If shareholder, % held		If shareholder, % held	
Date of birth		Date of birth	
Permanent residential address & postcode		Permanent residential address & postcode	
Date moved in		Date moved in	
Do you own this property	<input type="checkbox"/>	Do you own this property	<input type="checkbox"/>
Contact telephone no.		Contact telephone no.	
Email address		Email address	
Nationality		Nationality	
Country of birth		Country of birth	

Security Information										
No. of properties being used as security for this loan					For portfolio loans, please provide a portfolio spreadsheet					
Full postal address & postcode							The year built			
Property type		Property style		Property tenure		No. of rooms				
House	<input type="checkbox"/>	Detached	<input type="checkbox"/>	Freehold	<input type="checkbox"/>	Bedrooms				
Bungalow	<input type="checkbox"/>	Semi-detached	<input type="checkbox"/>	Flying freehold	<input type="checkbox"/>	Bathrooms				
Maisonette	<input type="checkbox"/>	terraced	<input type="checkbox"/>	Feuhold	<input type="checkbox"/>	Kitchens				
Cottage	<input type="checkbox"/>	Link detached	<input type="checkbox"/>	Leasehold	<input type="checkbox"/>	Other rooms (communal)				
Flat	<input type="checkbox"/>	Above commercial	<input type="checkbox"/>	Years on lease		Outbuildings				
Converted houses to leasehold flats		Multi-unit freehold block		House of multiple occupation		Flat & apartments				
Year it was converted		No. flats in the block		No. rentable rooms		No. of floors in the building				
No. of flats		Is freehold shared		is it currently licenced		No. of flats in the block				
No. self-contained		No. of leaseholds		Will facilities be shared		Flat on which floor				
Are you able to confirm that all room sizes meet the legal & technical requirements for the proposed dwelling						Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
Have the external walls been completed with cladding, or has cladding been added to the external walls						Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
Provide any further information about the property particularly if there is anything non-standard about the property, construction, title or ownership										
Improvements to the Property										
Has the property been refurbished in the last 12 months					Do you intend to carry out works on this property					
<input type="checkbox"/>					<input type="checkbox"/>					
If works have been done, provide details and costs of work below					If works to be done, provide details and costs of work below					
BTLs only (occupancy & tenants)										
Does the property comprise of more than one self-contained unit					If yes, how many units					
<input type="checkbox"/>										
Will the property have a full repairing and insuring lease on, or before, completion of the loan application							Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
If no, Is the property vacant							Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Yes <input type="checkbox"/> No <input type="checkbox"/>							If no, is the property let on a licence		Yes	<input type="checkbox"/>
									No	<input type="checkbox"/>
How many tenants will occupy the property						Type of tenancy agreements in place				
How many households will occupy the property						Expected monthly rental income		£		
Trading from the properties										
Do you, or any connected business trade from any of the properties on this application							Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Do you, or any connected business generate more than 30% of the total rental income							Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
If you have answered yes to the above questions, please tell us the nature of trade										

## Financial Details

### Applicant 1

Occupation	<input type="text"/>
Gross annual salary/net profit	£ <input type="text"/>
Residential mortgage balance	£ <input type="text"/>
Total asset value	£ <input type="text"/>
Total liabilities	£ <input type="text"/>
Total net worth	£ <input type="text"/>
Do you have any adverse credit	Yes <input type="checkbox"/> No <input type="checkbox"/>

### Applicant 2

Occupation	<input type="text"/>
Gross annual salary/net profit	£ <input type="text"/>
Residential mortgage balance	£ <input type="text"/>
Total asset value	£ <input type="text"/>
Total liabilities	£ <input type="text"/>
Total net worth	£ <input type="text"/>
Do you have any adverse credit	Yes <input type="checkbox"/> No <input type="checkbox"/>

### Applicant 3

Occupation	<input type="text"/>
Gross annual salary/net profit	£ <input type="text"/>
Residential mortgage balance	£ <input type="text"/>
Total asset value	£ <input type="text"/>
Total liabilities	£ <input type="text"/>
Total net worth	£ <input type="text"/>
Do you have any adverse credit	Yes <input type="checkbox"/> No <input type="checkbox"/>

### Applicant 4

Occupation	<input type="text"/>
Gross annual salary/net profit	£ <input type="text"/>
Residential mortgage balance	£ <input type="text"/>
Total asset value	£ <input type="text"/>
Total liabilities	£ <input type="text"/>
Total net worth	£ <input type="text"/>
Do you have any adverse credit	Yes <input type="checkbox"/> No <input type="checkbox"/>

## Additional security

Full postal address & postcode		<input type="text"/>		The year built		<input type="text"/>	
Property type		Property style		Property tenure		No. of rooms	
House	<input type="checkbox"/>	Detached	<input type="checkbox"/>	Freehold	<input type="checkbox"/>	Bedrooms	<input type="text"/>
Bungalow	<input type="checkbox"/>	Semi-detached	<input type="checkbox"/>	Flying freehold	<input type="checkbox"/>	Bathrooms	<input type="text"/>
Maisonette	<input type="checkbox"/>	terraced	<input type="checkbox"/>	Feuhold	<input type="checkbox"/>	Kitchens	<input type="text"/>
Cottage	<input type="checkbox"/>	Link detached	<input type="checkbox"/>	Leasehold	<input type="checkbox"/>	Other rooms (communal)	<input type="text"/>
Flat	<input type="checkbox"/>	Above commercial	<input type="checkbox"/>	Years on lease	<input type="text"/>	Outbuildings	<input type="text"/>
Converted houses to leasehold flats		Multi-unit freehold block		House of multiple occupation		Flats & Apartments	
Year it was converted	<input type="text"/>	No. flats in the block	<input type="text"/>	No. rentable rooms	<input type="text"/>	No. floors in the building	<input type="text"/>
No. of flats	<input type="text"/>	Is freehold shared	<input type="text"/>	Is it currently licenced	<input type="text"/>	No. flats in the block	<input type="text"/>
No. self-contained	<input type="text"/>	No. of leaseholds	<input type="text"/>	Will facilities be shared	<input type="text"/>	Flat on which floor	<input type="text"/>
Are you able to confirm that all room sizes meet the legal & technical requirements for the proposed dwelling						Yes	<input type="checkbox"/> No <input type="checkbox"/>
Have the external walls been completed with cladding, or has cladding been added to the external walls						Yes	<input type="checkbox"/> No <input type="checkbox"/>
Provide any further information about the property particularly if there is anything non-standard about the property, construction, title or ownership							

### Improvements to the Property

Has the property been refurbished in the last 12 months	<input type="checkbox"/>	Do you intend to carry out works on this property	<input type="checkbox"/>
If works have been done, provide details and costs of work below		If works to be done, provide details and costs of work below	
<input type="text"/>		<input type="text"/>	

### BTLs only (occupancy & tenants)

Does this property comprise of more than one self-contained unit	<input type="checkbox"/>	If yes, how many units	<input type="text"/>
Does the property have a full repairing and insuring lease	<input type="checkbox"/>	Is the property vacant	Yes <input type="checkbox"/> No <input type="checkbox"/>
How many tenants occupy the property	<input type="text"/>	Type of tenancy agreement	<input type="text"/>
How many households occupy the property	<input type="text"/>	Current monthly rental income	£ <input type="text"/>

### Existing borrowing (additional security)

Have you approached your existing lender to discuss this loan	<input type="checkbox"/>	Are you seeking further borrowing whilst keeping existing loan	<input type="checkbox"/>
Current market value	£ <input type="text"/>	Existing monthly mortgage payment	£ <input type="text"/>
Current mortgage balance	£ <input type="text"/>	Current interest rate	<input type="text"/>
Amount paid for the property	£ <input type="text"/>	Penalty for redeeming this mortgage	£ <input type="text"/>
Date the property was purchased	<input type="text"/>	Redemption penalty end date	<input type="text"/>
Date current mortgage started	<input type="text"/>	Years remaining on the mortgage	<input type="text"/>
Existing lender	<input type="text"/>	Account number	<input type="text"/>

## Eligibility & Further Information

Are all applicants' incomes sufficient to support personal expenditure	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	If you have answered <b>no</b> to any of these questions, please provide more detail in notes section
Do all applicants have permanent right to remain in the UK	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
Are all applicants tax affairs in order and all HMRC dealings up to date	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
Has any related corporate structure been set up by a qualified tax adviser	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
Has any applicant ever been convicted of a criminal offence	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	If you have answered <b>yes</b> to any of these questions, please provide more detail in notes section
Does any applicant or related party dwell, or intend to dwell in the security	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	
Have you approached any other brokers in connection with this enquiry	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	

## Current Property Holdings

### Applicant 1

Address & postcode	Current value	Mortgage	Monthly rental	Property type
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	

### Applicant 2

Address & postcode	Current value	Mortgage	Monthly rental	Property type
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	

### Applicant 3

Address & postcode	Current value	Mortgage	Monthly rental	Property type
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	

### Applicant 4

Address & postcode	Current value	Mortgage	Monthly rental	Property type
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	
	£	£	£	

If you own more properties, could you provide copies of portfolio spreadsheets

## Notes

## Notes

## Declaration

I/we confirm that the information provided in this document is true, accurate and can be evidenced

Completed by

Date

Our assessment and any terms or quotes issued will be based solely on the information provided in this form. Loans will not be granted on this data alone and you will need to provide further information and evidence to support all data provided, should you wish to apply for a loan. Any rates quoted are not guaranteed and will only be valid on the date issued. Lenders may change their criteria, terms and conditions at any time. We cannot guarantee you will be able to obtain any mortgage or loan based on the information supplied in this document and we cannot be held responsible for any decision made by any lender. All regulated firms will carry out their own background checks on the validity of any information provided to us and suspicious activity will be reported to the appropriate authorities.

**Your home or property may be repossessed if you do not keep up to date or make any loan repayments when due for any mortgage or loan secured on the property.**

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