



|   |  |  |  |
|---|--|--|--|
|  |  |  |  |
| Brokers Name  |  | Contact Name   |  |
| FSA Number  |  | Telephone & Fax Number   |  |
| e-mail address  |  | Post Code  |  |

|   |                    |          |
|---|--------------------|----------|
| <b>Product type:</b> Please delete as appropriate |                    |          |
| House Purchase / Re-mortgage                      | First Time Buyers  | Yes / No |
| Residential / Investment                          | Self Certification | Yes /No  |
| Product Required (Next Move, House2House etc):    |                    |          |

| Applicant Details   | Applicant One   | Applicant Two   |
|---|---|---|
| Title   |   |   |
| Forename  |   |   |
| Middle Name(s)  |   |   |
| Surname   |   |   |
| Date of Birth   | / /   | / /   |
| 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) (covering last 3 years) |   |   |
| Date moved to address                                     | / /   | / /   |
| Residential status at <b>current</b> 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      |                                     |  |       |
|-------------------|-------------------------------------|--|-------|
| Loan Amount       | £                                   | Term   | years |
| Purchase Price    | £                                   | Estimated value of property (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   |  |  |
| Work telephone number  |  |  |
| Is the position Permanent                                      | Yes / No   | Yes / No   |
| Start date of employment & if Self-Employed % of share holding |  |  |

| <b>Finance Details</b>  |                     |                     |
|---|---------------------|---------------------|
| 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  |
| Annual income, please detail commission, bonuses etc & any other income (ie rental) | £                   | £                   |

| <b>Commitments</b> (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 (credit card, loan)                                 |  | Amount o/s      | £ |
| Lender   |  | Monthly payment | £ |
| Intend to re-pay on completion? Yes/No                   |  |                 |   |

| <b>Declaration</b>  |
|---|
| <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. BM may use a system of credit scoring when assessing applicant(s) suitability (known as 'automated decisioning').</p> <p>(c) BM 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, BM 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><b>Signed by the Introducer</b></p> <p style="text-align: center;"><b>Printed</b></p> <p style="text-align: right;"><b>Date</b></p> |