



Tel: 023 9286 5806

Fax: 023 9286 5808

Email: sales@pfcmortgages.com

From: Broker Name:

Broker Number:

Tel No:

Fax No:

Email:

Type of enquiry:

Purchase  Remortgage  RTB  BTL  LTB  Shared Ownership

FTB:  Yes  No

Income:  Proven  Self-Cert

# Approval In Principle

## Client(s) details

|   | Applicant 1  | Applicant 2  |
|---|--|--|
| 1. Title (Mr/Mrs/Miss/Ms)   | <input type="text"/>                                     | <input type="text"/>                                     |
| 2. Surname  | <input type="text"/>                                     | <input type="text"/>                                     |
| 3. First name(s)  | <input type="text"/>                                     | <input type="text"/>                                     |
| 4. Previous surname and/or first names and date name changed (e.g. Maiden name) | <input type="text"/>                                     | <input type="text"/>                                     |
| 5. Date of birth  | <input type="text"/>                                     | <input type="text"/>                                     |
| 6. Nationality  | <input type="text"/>                                     | <input type="text"/>                                     |
| 7. Right to reside in UK  | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 8. Dependants   | <input type="text"/>                                     | <input type="text"/>                                     |
| 9. Present Address  | <input type="text"/>                                     | <input type="text"/>                                     |
| 10. Time at present address   | <input type="text"/>                                     | <input type="text"/>                                     |
| 11. Previous address (if under 3 years at present)                              | <input type="text"/>                                     | <input type="text"/>                                     |
| 12. Marital Status  | <input type="text"/>                                     | <input type="text"/>                                     |
| 13. Has the mortgage/tenancy been DSS assisted in the last 12 months            | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |

## Loan details

|                                  |                      |                                |                      |
|----------------------------------|----------------------|--------------------------------|----------------------|
| 1. Lender required (if known)    | <input type="text"/> | 2. Product required (if known) | <input type="text"/> |
| 3. Rate Type/Option (if known)   | <input type="text"/> | 4. Loan Required               | <input type="text"/> |
| 4a. Term                         | <input type="text"/> | 5. Purchase Price              | <input type="text"/> |
| 6. OMV if RTB                    | <input type="text"/> | 7. Value if remortgage         | <input type="text"/> |
| 8. Current mortgage balance      | <input type="text"/> | 9. Current lender name         | <input type="text"/> |
| 10. Purpose of further borrowing | <input type="text"/> |                                |                      |

## Other existing debts

| Applicant   | Debt Type            | Lender               | Monthly Payment        | Account Number       | Balance Outstanding    | Secured                  | Paid by Business         | Repaid on Completion     |
|---|----------------------|----------------------|------------------------|----------------------|------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> 1 <input type="checkbox"/> 2 | <input type="text"/> | <input type="text"/> | <input type="text"/>   | <input type="text"/> | <input type="text"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> 1 <input type="checkbox"/> 2 | <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> 1 <input type="checkbox"/> 2 | <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> 1 <input type="checkbox"/> 2 | <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> 1 <input type="checkbox"/> 2 | <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> 1 <input type="checkbox"/> 2 | <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="text"/> | £ <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Adverse credit

1. Have you or your client carried out a recent credit search?  Yes  No

2. Have you obtained the credit details from a credit agency?  Yes  No

3. Please provide full details of any adverse credit including dates, amounts, when registered and if satisfied; plus any other details you require us to be aware of



## Property details

|  |  |  |          |                      |  |                      |
|--|--|--|----------|----------------------|--|----------------------|
| 1. Description of property                                 |  |  |          |                      |  |                      |
| 2. Tenure  |  |  |          |                      |  |                      |
| 3. State number of:  | Receptions   | <input type="text"/>   | Bedrooms | <input type="text"/> | Kitchens   | <input type="text"/> |
|  | Bathrooms  | <input type="text"/>   | WCs      | <input type="text"/> | Garages  | <input type="text"/> |
|  | Basements  | <input type="text"/>   | Floors   | <input type="text"/> |  |                      |
| 3a. How many stories in the building                       | <input type="text"/>                                     | 3b. Which floor does the flat occupy   |          |                      | <input type="text"/>                                     |                      |
| 4. Construction - Walls                                    | <input type="text"/>                                     | 5. Construction - Roof   |          |                      | <input type="text"/>                                     |                      |
| 6. Is the property ex-local authority/housing association? | <input type="checkbox"/> Yes <input type="checkbox"/> No | 6a. Was the property purchased at a discounted purchase price within the last 3 years? |          |                      | <input type="checkbox"/> Yes <input type="checkbox"/> No |                      |
| 7. Agricultural restrictions?                              | <input type="checkbox"/> Yes <input type="checkbox"/> No | 8. Above commercial premises?  |          |                      | <input type="checkbox"/> Yes <input type="checkbox"/> No |                      |
| 9. Will the property be your main residence?               | <input type="checkbox"/> Yes <input type="checkbox"/> No | 10. Is the property New Build?   |          |                      | <input type="checkbox"/> Yes <input type="checkbox"/> No |                      |
| 11. Do you intend to let the property?                     | <input type="checkbox"/> Yes <input type="checkbox"/> No | 12. If Yes, expected rental income?  |          |                      | <input type="text"/>                                     |                      |

## Terms and conditions

I/we understand, declare and acknowledge that:

1. the information given on this form is true and complete to the best of my/our knowledge;
2. you will use this information given on this form to decide, in principle, whether you would be willing to accept my/our formal application for a mortgage (if I/We make one);
3. you may reject our formal application (if I/we make one), even if you have given your agreement in principle, especially if the information given on this form has changed by the time I/we make our formal application

I/we consent to:

1. you disclosing any of the information given on this form to the operators of the National Hunter System, the Credit Industry Fraud Avoidance System and other collective mortgage data checking systems, who may make the information available to other lenders or subscribers of their system where this is done in the interest of fraud prevention;
2. you requesting a credit reference (which will include information that you may use for an automated credit assessment) from one or more credit reference agencies and to your disclosing any of the information given on this form to such agencies. I/we understand that this information will then be made available to other requesting credit references against me/us and may be used, for example, in relation to future lending decisions, fraud prevention, debtor tracing, etc. I/we further understand that any credit reference agencies who you contact will keep a record of the references you request about me/us;
3. you making any other enquiries that you consider necessary in connection with this application and to you disclosing any of the information given on this form in order to make those enquiries;
4. you disclosing the results of any (or all) of the enquiries you make about me/us to the introducer of my/our application to the Society who is named on the front of this form.

I/We (The introducer), by accepting these terms and conditions, confirm that the client(s) is/are aware of the terms of the above declaration and, specifically, have given permission for credit searches to be carried out. I/We also confirm that I/we are fully aware of my/our obligations under the data Protection Act and the potential penalties for completing this declaration without the clients consent. Please be advised that if you are in any doubt about your obligations regarding this issue under the Data Protection Act DO NOT CONTINUE ANY FURTHER, DO NOT AGREE TO THE TERMS AND CONDITIONS and contact your packager for clarification. PFC Mortgages will be unable to accept any requests to carry out credit searches or perform any other action in connection with establishing the availability of finance for the client unless the terms and conditions have been agreed to.

Signature of introducer:

Date:

**The applicant(s) has / have agreed to the above terms and conditions.**