

Mortgage Illustration enquiry form.



Broker name	Username
<input type="text"/>	<input type="text"/>
FCA number	Contact number
<input type="text"/>	<input type="text"/>

Create new case

Application type

New purchase Remortgage

Property purpose

Owner occupation Second property Buy to Let

Payment route

Add case applicants

Applicant 1	Applicant 2
Application type	Application type
<input checked="" type="checkbox"/> First time buyer <input checked="" type="checkbox"/> Existing TSB borrower	<input checked="" type="checkbox"/> First time buyer <input checked="" type="checkbox"/> Existing TSB borrower
<input checked="" type="checkbox"/> Borrower with other lender <input checked="" type="checkbox"/> Mortgage free	<input checked="" type="checkbox"/> Borrower with other lender <input checked="" type="checkbox"/> Mortgage free
Forename <input type="text"/>	Forename <input type="text"/>
Surname <input type="text"/>	Surname <input type="text"/>
Date of birth (DD/MM/YYYY)	Date of birth (DD/MM/YYYY)
<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"/>

Loan requirements

Property

Property location

England Scotland Wales

Have the applicants located the property they wish to buy? Yes No

Property type

Converted flat / Maisonette Detached bungalow Detached house Purpose built flat / Maisonette

Semi – detached bungalow Semi – detached house Terraced bungalow Terraced house

Self contained flat / Maisonette Self contained studio flat

Is the property a new build / newly converted or refurbished? Yes No

Buy to Let details

Do any of the applicants or their relatives intend to live in the property during the mortgage term? Yes No

Are all of the applicants first time landlords? Yes No

Do any of the applicants currently own any other let properties? Yes No

Have any of the applicants inherited or been gifted the property? Yes No

Has your client or a member of their family ever lived in the property since they acquired it? Yes No

Loan requirements

Total loan amount

Interest only amount

Preferred loan term

Years

Months

Amount transferred from other lender

Product selection

Loan part 1

Product code (if known)

Product type

Beneficial rate period

Initial interest rate

Repayment amount

Repayment term

Repayment type

Loan part 2

Product code (if known)

Product type

Beneficial rate period

Initial interest rate

Repayment amount

Repayment term

Repayment type

Loan part 3

Product code (if known)

Product type

Beneficial rate period

Initial interest rate

Repayment amount

Repayment term

Repayment type

Advice fees & declaration

Level of advice

Advice given

Execution only –
rejected advice

Execution only –
HNW customer

Execution only –
mortgage professional

Execution only –
non-interactive sale

Fee you will charge the applicant

Who is fee made payable to?

When is the fee to be paid?

On cancellation or decline

On redemption

Before loan starts

Prior to offer

On application

On completion

At interview

Cancellation post offer

Post Offer

Is the fee refundable?

No

Yes, as an amount

Yes, as a percentage

Amount refundable

Percentage refundable

Valuation type

Valuation and lender fees

Fee

Amount

By Credit / Debit Card

Add to loan

Fee

Amount

By Credit / Debit Card

Add to loan

Fee

Amount

By Credit / Debit Card

Add to loan

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