

# Intermediary Mortgage Illustration enquiry form.



intermediary.tsb.co.uk

Intermediary user ID

Payment Route

## Intermediary fees

Fee type

Fee 1

Fee 2

Fee 3

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Amount of fee

£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
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How much of the fee is refundable?

£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
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When payable

- |   |   |   |
|---|---|---|
| <input checked="" type="checkbox"/> On application            | <input checked="" type="checkbox"/> On application            | <input checked="" type="checkbox"/> On application            |
| <input checked="" type="checkbox"/> Within 14 days completion | <input checked="" type="checkbox"/> Within 14 days completion | <input checked="" type="checkbox"/> Within 14 days completion |
| <input checked="" type="checkbox"/> On cancellation           | <input checked="" type="checkbox"/> On cancellation           | <input checked="" type="checkbox"/> On cancellation           |
| <input checked="" type="checkbox"/> On completion             | <input checked="" type="checkbox"/> On completion             | <input checked="" type="checkbox"/> On completion             |

## Intermediary

Name of adviser (inc. Title)

Fax number/Telephone number

STD <input type="text"/>	STD <input type="text"/>
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Company name

Address/E-mail address

<input type="text"/>	Postcode <input type="text"/>
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Company FCA registration number

<input type="text"/>	E-mail <input type="text"/>
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## Customer details

Customer 1

Title Mr/Mrs/Miss/Ms/Dr/Other

Full forename(s)

Surname

Customer 2

Title Mr/Mrs/Miss/Ms/Dr/Other

Full forename(s)

Surname

Note: The names written here must be identical to the names of the buyer(s) of the property, for example, if you hold or will hold the property in joint names, you should give both names. If there are more than two of you applying, then the details of the additional person(s) applying must be sent out on a separate sheet. Please tick if separate sheet attached.

Date of birth (DD/MM/YYYY)

Gender



Male

Female

Marital status



Married

Single

Separated

Widowed

Divorced

No. of dependent children (if any)

Nationality

Country of residence

Previous name(s)

Current address

Customer 1

Postcode

Residential status



Mortgage free

Homeowner with a residential mortgage

Homeowner without a residential mortgage

Family/Friend

Renting private

Renting employer

Renting local authority

Home telephone number

Daytime telephone number

Mobile telephone number

Date of birth (DD/MM/YYYY)

Gender



Male

Female

Marital status



Married

Single

Separated

Widowed

Divorced

No. of dependent children (if any)

Nationality

Country of residence

Previous name(s)

Current address

Customer 1

Postcode

Residential status



Mortgage free

Homeowner with a residential mortgage

Homeowner without a residential mortgage

Family/Friend

Renting private

Renting employer

Renting local authority

Home telephone number

Daytime telephone number

Mobile telephone number

## Customer details (continued)

Fax number

STD

E-mail

Preferred contact method/time

Special need e.g. Braille, large print, etc.

When did you move to this address  
(DD/MM/YYYY)

If less than three years, please provide previous address

Postcode

Residential status at this address

Start date of residence  
(DD/MM/YYYY)

End date of residence  
(DD/MM/YYYY)

Fax number

STD

E-mail

Preferred contact method/time

Special need e.g. Braille, large print, etc.

When did you move to this address  
(DD/MM/YYYY)

If less than three years, please provide previous address

Postcode

Residential status at this address

Start date of residence  
(DD/MM/YYYY)

End date of residence  
(DD/MM/YYYY)

If total time at both addresses is less than three years, please give all previous addresses for the last three years on a separate sheet.  
If your correspondence address is different from that given by the first named applicant's present address, please give details on separate sheet.  
Please tick if separate sheet attached.

## Loan details

Estimated purchase price/valuation

£

Estimated amount of loan

£

In what area are you looking to purchase a property?



Scotland

North

North West

East

South Wales & West

Greater London

South East

Midlands

Purchase price of share (if shared ownership)

£

Full market value (if Right to Buy)

£

Customer type



Customer 1

First time buyer

Remortgage

Existing Borrower

Home mover

Non residential owner

Remortgage own conveyancer

Customer type



Customer 2

First time buyer

Remortgage

Existing Borrower

Home mover

Non residential owner

Remortgage own conveyancer

Source of deposit (both applicants to complete)



Bank/Building Society account in own name

Salary

Sale of property

Inheritance

Family gift

Other (please specify)

Multiple sources (please specify)

## Product details

Provide breakdown of the mortgage required. Parts 2 and 3 are where multiple products, terms or repayment types are required.

Product code (if known)

Part 1	Part 2	Part 3
<input type="text"/>	<input type="text"/>	<input type="text"/>

Type of product e.g. fixed, tracker

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Interest rate charged

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Product term/end date

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Loan amount

£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
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Loan term (years)

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Repayment type

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Purpose

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Existing TSB mortgage account number (if porting)

<input type="text"/>	<input type="text"/>	<input type="text"/>
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What is your preferred payment date?

What fees are to be added to the loan and not paid within 30 days of completion?

Product fees

Yes  No

Interest only amount

Give details of new or existing plans or policies to be used with the interest only part of this mortgage

Endowments	Stocks & Shares ISA	Unit Trusts/Open Ended Investment Companies (UK)	Investment Bonds	Stocks & Shares	Pensions	Sale of other residential property – Please also complete Interest only – Other residential property form for each property.	Total
£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

Monthly premium

£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
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Reference/Account number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Maturity date for each repayment vehicle

(For sale of residential property, provide date of intended sale)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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### DATA PROTECTION

Please note that your personal information is held by TSB Bank plc and in order for us to provide you with products and services, we need to collect and hold information about you. Details of how we use your information, and when we may share it, are contained in our Privacy Statement which is available on our website [intermediary.tsb.co.uk/privacy](http://intermediary.tsb.co.uk/privacy)

If you have any questions about this, please don't hesitate to ask.

Signature of Adviser

Date (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"/>
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If you'd like this in another format such as large print, Braille or audio please contact your Business Development Manager.

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