

# 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

#### Application type

First time buyer  Existing TSB borrower

Borrower with other lender  Mortgage free

#### Forename

#### Surname

#### Date of birth (DD/MM/YYYY)

### Applicant 2

#### Application type

First time buyer  Existing TSB borrower

Borrower with other lender  Mortgage free

#### Forename

#### Surname

#### Date of birth (DD/MM/YYYY)

## 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

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

TSB Bank plc. Registered Office: Henry Duncan House, 120 George Street, Edinburgh EH2 4LH. Registered in Scotland no. SC95237. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 191240. TSB Bank plc is covered by the Financial Services Compensation Scheme and the Financial Ombudsman Service.

**FOR MORTGAGE PROFESSIONAL AND INTERMEDIARY USE ONLY.  
NOT FOR PUBLIC DISTRIBUTION.**

