

Application Data Capture Form

For Mortgage Intermediary use only.

Customer surname:

Intermediary name:

Product Selection

The mortgage Type of mortgage: Purchase Remortgage Joint application: Yes No

Property location: England & Wales Scotland Northern Ireland

Buyer type: First time buyer Homeowner Moving mortgage Mortgaging unmortgaged home

Total amount to be borrowed:

Property value:

If remortgaging, main purpose of loan: Remortgage – no additional funds Additional funds – home improvements
 Additional funds – debt consolidation Additional funds – personal
 Additional funds – Help to Buy Equity Loan

The mortgage product – Tesco Bank only offers Capital and Interest repayments.

Mortgage term (years):

Product code/description:

Product fee paid: Pay on application Add to mortgage

Personal Details

Applicant 1 Title: First name:

Middle name: Surname:

Date of birth: D D / M M / Y Y Y Y Gender: Male Female Marital status:

Clubcard number (if applicable):

Has the applicant ever been known by any other name: Yes No

Previous title: Previous first name:

Previous middle name: Previous surname:

Contact details Email address:

Home phone number: Work phone number:

Mobile phone number: Preferred contact: Home Work Mobile

Nationality and residency Nationality:

Country of Birth: Permanent resident in the UK: Yes No

Current address House/flat number: House/flat name:

Street: District:

Town: County:

Country: England Wales Scotland Northern Ireland

Postcode: Date moved in: M M / Y Y

Nature of occupancy: Home owner Parents Relative Friend
 Council tenant Other tenant Other

If homeowner – current property intention:

We require 3 years address history. If there is a previous or correspondence address, add into the Additional Information section at the end.

Applicant 2 Title: _____ First name: _____

Middle name: _____ Surname: _____

Date of birth: D D / M M / Y Y Y Y Gender: Male Female Marital status: _____

Clubcard number (if applicable): _____

Has the applicant ever been known by any other name: Yes No

Previous title: _____ Previous first name: _____

Previous middle name: _____ Previous surname: _____

Contact details Email address: _____

Home phone number: _____ Work phone number: _____

Mobile phone number: _____ Preferred contact: Home Work Mobile

Nationality and residency Nationality: _____

Country of Birth: _____ Permanent resident in the UK: Yes No

Current address House/flat number: _____ House/flat name: _____

Street: _____ District: _____

Town: _____ County: _____

Country: England Wales Scotland Northern Ireland

Postcode: _____ Date moved in: M M / Y Y

Nature of occupancy: Home owner Parents Relative Friend
 Council tenant Other tenant Other

If homeowner – current property intention: _____

We require 3 years address history. If there is a previous or correspondence address, add into the Additional Information section at the end.

Income and Employment

Applicant 1 – Current Employment

Employment type: Employed Employed (30% or more shares in company) Self employed Contract
 Not earning Homemaker Student/retired Pension income

Date started: D D / M M / Y Y Y Y Main employment: Yes No

Occupation type: _____ Job title: _____

Name of employer: _____

Paid by umbrella company: _____ Contract renewed: _____ Date contract ends: D D / M M / Y Y Y Y

Employment status: Permanent Temporary

Annual earnings Basic annual salary (before tax): _____

Overtime: _____ Commission: _____ Bonuses: _____

Employer's allowances: _____ Monthly pre tax deductions from salary: _____

Net profit current year: _____ Net profit previous year: _____ Net profit two years ago: _____

Net monthly income: _____ Monthly other income: _____

Other income Rental income: _____ Court approved maintenance: _____ Disability living allowance: _____

Attendance allowance: _____ Carers allowance: _____ Foster carers allowance: _____

Tax credit: _____ Child benefit: _____ Maternity pay: _____

Anticipated retirement age: _____

Applicant 2 – Current Employment

Employment type: Employed Employed (30% or more shares in company) Self employed Contract
 Not earning Homemaker Student/retired Pension income

Date started: D D / M M / Y Y Y Y Main employment: Yes No

Occupation type: Job title:

Name of employer:

Paid by umbrella company: Contract renewed: Date contract ends: D D / M M / Y Y Y Y

Employment status: Permanent Temporary

Annual earnings Basic annual salary (before tax):

Overtime: Commission: Bonuses:

Employer's allowances: Monthly pre tax deductions from salary:

Net profit current year: Net profit previous year: Net profit two years ago:

Net monthly income: Monthly other income:

Other income Rental income: Court approved maintenance: Disability living allowance:

Attendance allowance: Carers allowance: Foster carers allowance:

Tax credit: Child benefit: Maternity pay:

Anticipated retirement age:

Financial Commitments

The details below are required for each financial commitment which apply to applicants jointly or together. If more than one of each type of commitment is held use additional information section to capture.

Credit cards

Card provider:

Current outstanding balance: Will this be repaid before completion: Yes No

Source of funds to repay: Using part of this mortgage From sale of property
 New loan – credit card Savings Gift Final payment of loan

Balance at completion: Applicant: Applicant 1 Applicant 2 Both applicants

Loans or hire purchase agreements

Lender name:

Current outstanding balance:

Monthly repayment: Will this be repaid before completion: Yes No

Source of funds to repay: Using part of this mortgage From sale of property
 New loan – credit card Savings Gift Final payment of loan

Balance at completion: Applicant: Applicant 1 Applicant 2 Both applicants

Date of final payment: D D / M M / Y Y Y Y

Overdrafts

Overdraft provider:

Maximum overdrawn balance in previous 3 months: Will this be repaid before completion: Yes No

Source of funds to repay: Using part of this mortgage From sale of property
 New loan – credit card Savings Gift Final payment of loan

Balance at completion: Applicant: Applicant 1 Applicant 2 Both applicants

Mortgage accounts – If the mortgage type is remortgage, then existing mortgage details must be completed:

Lender name:		Monthly payment:	
Original purpose of loan:	<input type="checkbox"/> House purchase <input type="checkbox"/> Purchase land <input type="checkbox"/> Additional borrowing <input type="checkbox"/> Transfer of equity <input type="checkbox"/> Remortgage <input type="checkbox"/> Porting/product switch		
Original loan amount:	Outstanding balance:		
Current mortgage intention:	<input type="checkbox"/> To be repaid this advance <input type="checkbox"/> To be repaid partially this advance <input type="checkbox"/> To be repaid other sources <input type="checkbox"/> To be repaid partially other sources <input type="checkbox"/> Already redeemed <input type="checkbox"/> Continuing – not being redeemed <input type="checkbox"/> Continuing – buy to let		
Source of funds to repay:	<input type="checkbox"/> Sale of property <input type="checkbox"/> Savings <input type="checkbox"/> Loan <input type="checkbox"/> Gift <input type="checkbox"/> Final payment		
Balance at completion:	Monthly rental income:		
Applicant:	<input type="checkbox"/> Applicant 1 <input type="checkbox"/> Applicant 2 <input type="checkbox"/> Both applicants		
Outgoings – Total monthly outgoings for all applicants			
Food and drink, alcohol and tobacco:	Transport:		
Utility and other household bills:	Council tax:		
Ground rent and service charges:	Household goods and services:		
Insurance premiums and pension contributions:	Education, child care, maintenance:		
Other expenditure:			
Dependants	Number of child dependants:	Number of adult dependants:	
Property to be mortgaged	House/flat number:	House/flat name:	
Street:	District:		
Town:	County:		
Country: <input type="checkbox"/> England <input type="checkbox"/> Wales <input type="checkbox"/> Scotland <input type="checkbox"/> Northern Ireland	Postcode:		
Deposit details	Deposit amount:	Monthly payment amount:	
Source of deposit:	<input type="checkbox"/> Equity in present property <input type="checkbox"/> Own savings <input type="checkbox"/> Builders incentive scheme <input type="checkbox"/> Equity from sale of property <input type="checkbox"/> Inheritance <input type="checkbox"/> Other source – not repayable <input type="checkbox"/> Family gift – not repayable <input type="checkbox"/> Family sourced deposit – repayable		
Property Details			
Property description:	<input type="checkbox"/> Detached house <input type="checkbox"/> Semi-detached house <input type="checkbox"/> Mid-terraced house <input type="checkbox"/> End-terraced house <input type="checkbox"/> Converted flat <input type="checkbox"/> Purpose built flat <input type="checkbox"/> Converted studio flat <input type="checkbox"/> Purpose built studio flat <input type="checkbox"/> Detached bungalow <input type="checkbox"/> Semi detached bungalow <input type="checkbox"/> Mid-terraced bungalow <input type="checkbox"/> End-terraced bungalow <input type="checkbox"/> Purpose built maisonette <input type="checkbox"/> Converted maisonette		
Number of bedrooms:	Flat floor no:	Flat no of storeys:	
Flat above commercial premises:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Residential use only: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Year built: Y Y Y Y	Building construction:	Roof construction:	
Property location:	New property: <input type="checkbox"/> Yes <input type="checkbox"/> No		
Date of entry/target exchange date: D D / M M / Y Y Y Y	Financial incentives:		
Tenure of property: <input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold <input type="checkbox"/> Scottish freehold <input type="checkbox"/> Commonhold <input type="checkbox"/> Unknown			
Remaining term of lease:			

Valuation

Valuation type:

 Mortgage valuation Scottish home reportAccess arrangements: Vendor Estate agency Builder Other

Contact name:

Contact number:

Further detail:

Home Report Scotland

Original valuation date: D D / M M / Y Y Y Y

Original valuer company name:

House/flat number:

House/flat name:

Street:

District:

Town:

County:

Country: England Wales Scotland Northern Ireland

Postcode:

Other residents aged over 17

Resident 1 first name:

Resident 1 surname:

Resident 1 date of birth: D D / M M / Y Y Y Y

Resident 2 first name:

Resident 2 surname:

Resident 2 date of birth: D D / M M / Y Y Y Y

Direct debit details

Preferred payment date: D D / M M / Y Y Y Y

Bank account holder(s) name:

Sort code:

Bank account number:

Name and full postal address of bank/building society:

Solicitor details

Name of firm:

Solicitor first name:

Solicitor surname:

Building number:

Building name:

Street:

District:

Town:

County:

Country: England Wales Scotland Northern Ireland

Postcode:

Telephone number:

Fax number:

Email address:

Additional information