

# 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

**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:   /   /     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:   /

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:   /   /     Main employment:  Yes  No

Occupation type: \_\_\_\_\_ Job title: \_\_\_\_\_

Name of employer: \_\_\_\_\_

Paid by umbrella company: \_\_\_\_\_ Contract renewed: \_\_\_\_\_ Date contract ends:   /

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		
<b>Outgoings – Total monthly outgoings for all applicants</b>		Transport:	
Food and drink, alcohol and tobacco:	Council tax:		
Utility and other household bills:	Household goods and services:		
Ground rent and service charges:	Education, child care, maintenance:		
Insurance premiums and pension contributions:	Other expenditure:		
<b>Dependants</b>	Number of child dependants:	Number of adult dependants:	
<b>Property to be mortgaged</b>	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:		
<b>Deposit details</b>	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		
<b>Property Details</b>			
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 report

Access 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**

Multiple horizontal lines for additional information input.