

Data capture form

Customer name(s):

1. _____

2. _____

This form is for the use of financial intermediaries only and is not to be given to the public.

This data capture form is to be used to capture the required information for a Platform mortgage application when you are unable to access our online system, click, or external sourcing systems.

This form is not intended to be submitted to Platform. It will not be actioned and will be returned to you for electronic submission.

PRODUCT REQUIRED

Product required

Fixed/Discounted/Capped/Tracker Rate (when available)

Term of Fixed/Discounted/Capped/Tracker Rate

Mortgage Club to be used

(tick all applicable)

Conforming

Non Conforming

Buy to Let

Purchase

Remortgage

Let to Buy

Remortgage

Free Standard Legals

Exclusive to be used

Full Status

Right to Buy (Compulsory for all purchases and remortgages & added to the loan)

Right to Buy Express (Compulsory for all purchases and remortgages & added to the loan)

ADDITIONAL INFORMATION

Is this Sale? Advised Non-Advised Face to Face Non Face to Face

Arrangement fee paid to Introducer by applicant(s) £

Arrangement fee paid to packager (if appropriate) £

Has this fee been included in the loan? Yes No

Has this fee been included in the loan? Yes No

Valuation fee paid £

Estimated legal fees to be paid by applicant(s) £

Has this fee been included in the loan? Yes No

Has this fee been included in the loan? Yes No

Is any commission you receive being passed back to the applicant(s)? Yes No

If Yes, please state how much £

Repayment Method

Repayment Interest Only

If interest only, state how the loan will be repaid.

Endowment Pension ISA

Please state if Other

Provider

Monthly Premium £

Will the term of this mortgage take the applicant(s) beyond their intended retirement date? Yes No

If so, please state how the payments will be maintained into retirement.

Personal/Company Pension ISA Inheritance Other

Projected Retirement Age Applicant 1 Applicant 2

Are any of the applicants an owner/director/employee of any intermediary involved with this application? Yes No

A - PERSONAL DETAILS

1st APPLICANT

2nd APPLICANT

1 Forename(s)
 2 Middle Name(s)
 3 Surname(s)
 4 Title (*Mr / Mrs / Miss / Ms / other*)
 5 Gender
 6 Previous/other names & title (*if applicable*)
 7 Marital status (*married / single / divorced / living with partner / widowed / separated*)
 8 Date of birth
 9 Country of origin
 10 Resident in the UK
 11 Do you have the right to work and reside in the UK permanently? (*if no to either, please provide details on the additional information sheet*)
 12 National Insurance number
 13 Daytime contact telephone number
 14 Home / Mobile telephone number
 15 Email address
 16 Number and ages of dependent children
 17 Relationship to joint applicant(s)
 18 Current address
 19 Are you currently: (*Owner/tenant/living with relative/friend*)
 20 Is this an overseas address?
 21 Date moved to current address
 22 Previous address
 Please provide full address details for 3 years using additional information sheet if necessary.
 23 Were you: (*Owner/tenant/living with relative/friend*)
 24 Is this an overseas address?
 25 Date moved to previous address

Male Female
 Yes No
 Yes No
 H M
 Postcode
 Yes No
 / /
 Postcode
 A
 Yes No
 / /

Male Female
 Yes No
 Yes No
 H M
 Postcode
 A
 Yes No
 / /
 Postcode
 A
 Yes No
 / /

B - INCOME DETAILS - EMPLOYED

1st APPLICANT

2nd APPLICANT

If you have 25% or more shareholding in your company you should complete the Self Employed Applicant's details in Section C overleaf

1 Employment Status
 2 Name, address and telephone number of employer
 Company name
 Address
 If the contact for reference purposes is different, please provide details on the additional information sheet.
 Telephone number and fax number
 3 Job title
 4 Payroll number
 5 Is your position?
 6 Date employment started if less than 1 year please provide details of previous employers on the additional information sheet
 7 Time continuously employed in this line of business
 8 What is your shareholding in the company? (*if 25% or more please complete Self Employed Section C overleaf*)
 9 Basic annual income
 10 Average annual bonus/commission/overtime payments
 11 Total annual income
 12 Any other guaranteed income
 13 Source of other income

Employed Self Employed
 Non Employed Retired
 Company name
 Address
 Postcode
 T F
 Permanent Fixed Term (*please provide details*)
 Casual (*please provide details*)
 / /
 %
 £ p.a.
 £ p.a.
 £ p.a.
 £ p.a.

Employed Self Employed
 Non Employed Retired
 Company name
 Address
 Postcode
 T F
 Permanent Fixed Term (*please provide details*)
 Casual (*please provide details*)
 / /
 %
 £ p.a.
 £ p.a.
 £ p.a.
 £ p.a.

C - INCOME DETAILS - SELF EMPLOYED

1st APPLICANT

2nd APPLICANT

To be completed if you have 25% or more shareholding in your company

1 Name and address of company

Please provide details of any other business on the additional information sheet.

2 Nature of business

3 Company registration number (if applicable)

4 VAT number (if applicable)

5 Date started self employment? (if under 2 years please provide details of previous employment/self employment on the additional information sheet)

6 What is your shareholding? (if less than 25% please complete section B)

7 Are you a professional property developer?

8 Name, address and telephone number of your accountants.

9 What qualifications does your accountant hold? (Chartered / Certified etc)

10 Your share of the last 3 years net profit figures (or P60 amounts if on PAYE) (Year 1 being most recent) Figures for third year required on Mainstream applications over £500,000 only

11 Total annual income

12 Any other guaranteed income

13 Source of other income

Postcode

Postcode

Postcode

Postcode

Postcode

Year 1 £	Year 2 £
For Mainstream applications over £500,000 only:	Year 3 £
£	
£	

Postcode

Postcode

Postcode

Postcode

Postcode

Year 1 £	Year 2 £
For Mainstream applications over £500,000 only:	Year 3 £
£	
£	

D - FINANCIAL DETAILS - Current / Latest Residential Mortgage / Tenancy Details

All mortgages / tenancies in the last 12 months. Please state your residential mortgage first.

Applicant 1,2,3,4 or joint	Lender / Landlord Name & Address	Account Number	Date Mortgage / Tenancy started	If Tenancy is it private? Y/N	Amount of loan outstanding?	Monthly payment	No. of missed payments			Non Conforming Y/N	Is this mortgage to be retained? Y/N
							months 1-3	months 4-6	months 7-12		
			/		£	£					
			/		£	£					
			/		£	£					

D - FINANCIAL DETAILS Continued...

1st APPLICANT

2nd APPLICANT

1 If Yes to residential mortgage retained, reason for retention?

2 What will be your monthly payment on the mortgage you are retaining on completion of this loan?

3 If your residential mortgage is to be retained and rented, what will the monthly rental income be?

4 Have you had 3 or more months arrears (cleared or not) on any secured or unsecured loan in the last 2 years? If so how many?

5 Have you recieved housing benefit totalling >50% of the monthly payment due in the last 12 months?
If Yes, number of payments

6 Have you ever been bankrupt?
If yes bankruptcy registration / discharge date

7 Have you ever entered into an IVA?
IVA arrangement / completion date

8 Do you have a conviction for any offence or have a prosecution pending other than for a driving related offence or a spent conviction? If yes please provide details on the additional information sheet

9 Have you ever had a property repossessed? If yes, please confirm date of repossession and lenders name

Please give monthly amounts of any of the following payment obligations:-

10 Maintenance/alimony

11 IVAs & Outstanding Balance £

12 How many Credit / Debit Cards do you hold & balance outstanding?
How much will be repaid on completion?

13 Have you any other non credit monthly commitments?

Ex- Marital Renting

£

£

Yes No Months

Yes No Months

Last 1-6 months Last 7-12 months

Yes No

Reg / / Dis / /

Yes No

Arr / / Com / /

Yes No

Yes No / /

£

£ £

£ £

£

£

Ex- Marital Renting

£

£

Yes No Months

Yes No Months

Last 1-6 months Last 7-12 months

Yes No

Reg / / Dis / /

Yes No

Arr / / Com / /

Yes No

Yes No / /

£

£ £

£ £

£

£

Other credit commitments – (including student loans excluding business loans)

Applicant 1,2,3,4 or joint	Lender	Balance O/S	Monthly Payment	Loan End date	Will be paid before completion? Y/N	Secured? Y/N	Is the secured loan paid by the applicant's business? Y/N
		£	£	/			
		£	£	/			
		£	£	/			
		£	£	/			
		£	£	/			

E - DETAILS OF PROPERTY TO BE MORTGAGED

1 Address of property

2 Tenure of property

3 Type of property

4 Description: Flat/Studio/Maisonette

Please state number of each:

Postcode

Freehold Leasehold If lease unexpired, lease term yrs

House Detached Semi-det Mid Terrace End Terrace

Bungalow Studio Flat Maisonette

No. of floors in block No. of units Which floor is property located Access via Balcony? Yes No

Purpose built Converted

Receptions Bedrooms Kitchens Bathrooms Garages Outbuildings

Front garden Rear garden Parking space Is this open plan?

E - DETAILS OF PROPERTY TO BE MORTGAGED Continued...

<p>5 Is the property of standard construction? <i>(if no please provide details on the additional information sheet)</i></p> <p>6 Has the property got any agricultural restrictions?</p> <p>7 Is the property a working farm/smallholding/croft?</p> <p>8 Does the property have more than 3 acres?</p> <p>9 Is the property: Please circle if applicable</p> <p>10 If you have previously purchased from the local authority, was this within the last 5 years?</p> <p>11 Is the property near/above/adjacent to commercial premises? <i>(if yes please confirm type, proximity etc.)</i></p> <p>12 Does the applicant intend to let the property? <i>(if yes provide details)</i></p> <p>13 Is >25% of the property for non residential usage?</p> <p>14 Please give the names of all persons over the age of 17 who will occupy the property</p> <p>15 Buy to Let / Let to Buy only: Anticipated rental income</p> <p>16 Buy to Let only: Is the property to be occupied by an immediate family member?</p> <p>17 Including this application, how many Buy to Let properties do you and your associates have?</p> <p>18 Including this application, how many mortgages do you currently have with Platform or the Co-operative Banking Group?</p> <p>19 Is the property less than 12 months old?</p> <p>20 Has the property been converted in the last 12 months?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/> Year of construction <i>if under 10 years is NHBC available?</i> <input type="text"/> Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, how many? <input type="text"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Ex Local Auth / MOD/RAF / Housing Ass. / Ex Police</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, date purchased <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/></p> <table border="0"> <tr> <td>First Name</td> <td>Surname</td> <td>Age</td> <td>Relationship to applicant</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table> <p>per month £ <input type="text"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>	First Name	Surname	Age	Relationship to applicant	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
First Name	Surname	Age	Relationship to applicant										
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>										
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>										

F - DETAILS OF LOAN REQUESTED

1 Amount of loan requested £ <input type="text"/>	2 Term of loan required <input type="text"/> years
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Flexible product only

1 Initial loan amount £ <input type="text"/>	2 Reserve fund credit limit £ <input type="text"/>
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REMORTGAGE

1 Estimated value of property £

2 Would you like an automatic valuation on this case? Yes No

3 Date originally Purchased <input type="text"/> / <input type="text"/> / <input type="text"/>	Original Purchase Price £ <input type="text"/>	Amount originally borrowed to purchase property £ <input type="text"/>
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4 Purpose of remortgage Home Improvements £ for £ Debt Consolidation Capital Raising Business Purposes

Please tick all boxes that apply (If £ for £, tick this box only)

If Capital Raising, then is a Transfer of Equity involved? Yes No

5 Any second charges Yes No If yes, is this to be paid before completion (please provide details on Section J Additional Information Sheet)

PURCHASE

1 Purchase price (discounted price if under council Right to Buy scheme) £

2 Estimated Value of Property £

3 Would you like an automatic valuation on this case? Yes No

4 Is the property being purchased from a member of your family? Yes No

5 Is this a private sale? Yes No

6 Will the property be subject to a Deed of Gift? Yes No

7 Are you a First Time Buyer? Yes No

8 Are you selling your existing property? Yes No If yes, what is the sale price? £

If no, what are your intentions?

9 Please provide full details of the source of your deposit (please tick all boxes that apply)

Savings <input type="checkbox"/>	Inheritance <input type="checkbox"/>	Cashing in investment Policy <input type="checkbox"/>	Gift <input type="checkbox"/>
Property Sale <input type="checkbox"/>	Loan(s) <input type="checkbox"/>	Other <input type="text"/>	

10 Name, address & tel. no. of selling agents

11 Name, address & tel. no. of vendor

G - SOLICITORS DETAILS

We will instruct your solicitor to act on our behalf provided they are on our panel of solicitors.

Firm name	<input type="text"/>	Solicitor's name	<input type="text"/>	
Address	<input type="text"/>		Postcode	<input type="text"/>
Telephone number	<input type="text"/>			

H - INSURANCE REQUIREMENTS

Please answer all of the following questions.
Your mortgage application may be delayed if these sections are not completed.

We have made arrangements with Legal & General Insurance Limited to provide insurance services. Please note that contents insurance is not available for Buy to Let products.

Buildings / Buildings & Contents

Adequate Buildings Insurance for the mortgaged property is a condition of the loan. You should also insure the contents. Flats – under the terms of the lease the buildings insurance is usually the responsibility of the freeholder. We can help with your insurance requirements through our arrangement with Legal & General Insurance.

Please tick the box if you DO require Legal & General to contact you with regards to a Home Insurance quotation.

If you arrange Buildings Insurance cover through an alternative insurer, an administration fee will be payable.

Please note that full cover details will need to be supplied to us and failure to do this may result in a delay in processing your mortgage.

Mortgage Payment Protection Insurance

Platform strongly recommends that you take out accident, sickness and involuntary unemployment insurance known as mortgage payment protection insurance, in connection with your mortgage application. Following the Government's changes to income support, it is clear that protecting you and your family has never been more important.

We can help you with your insurance requirements through our arrangement with Legal & General Insurance.

Please tick the box if you DO require Legal & General to contact you with regards to a Mortgage Payment protection Insurance quotation.

Platform and your Introducer may receive commission from Legal & General in respect of your insurance requirements. Legal & General Insurance Limited, Registered in England No. 423930, One Coleman Street, London, EC2R 5AA, is authorised and regulated by the Financial Services Authority for insurance business. Legal & General is not part of the Group (as defined in the Data Protection Notice). Platform do not charge any fees for introduction to Legal & General Insurance Company.

I - DETAILS OF OTHER PROPERTIES OWNED

ADDRESS (including Postcode)	Date of purchase	Tenancy type (eg AST)	Monthly rental £	Estimated value £	Amount of loan outstanding £	Name & full address of the lender	lender	Start date of current mortgage	Monthly payment to lender
1. Owner(s) Full names									
2. Owner(s) Full names									
3. Owner(s) Full names									

J - PAYMENT DETAILS

Your Bank/Building Society Account details for Direct Debit payments

Name(s) of account holder(s):	<input type="text"/>	<input type="text"/>	
Bank Sort Code:	<input type="text"/>	Bank/Building Society account number:	<input type="text"/>
Bank/Building Society name:	<input type="text"/>	Bank/Building Society address:	<input type="text"/>

Your card details for fee payments

Type of card:	<input type="text"/>	Credit card number:	<input type="text"/>
Security code:	<input type="text"/>	(the last 3 digits on the back of the credit card or 4 digits above the credit card number on Amex)	
Expiry date:	<input type="text"/>	Name on the card:	<input type="text"/>
Billing address of the card holder:	<input type="text"/>		
		Postcode:	<input type="text"/>

