





DECISION IN PRINCIPLE INFORMATION FOR THE USE OF PROFESSIONAL MORTGAGE INTERMEDIARIES ONLY

ADVISING INTERMEDIARY DETAILS	
Name	
Company Name	
FCA Number	
Advice Fee	
MORTGAGE DETAILS	REPAYMENT TYPE
Property value/Purchase Price	Capital and Interest £
(If RTB use the Open Market Value) £	Interest only £
Mortgage Amount £	Term years months
Purchase/Remortgage Purchase Remortgage	Fee added to loan if successful Yes No
Purpose of the Mortgage? First Home	IF REMORTGAGE-PURPOSE OF REMORTGAGE
Home Mover	
Second Home	Debt Consolidation
Right To Buy	Extend Lease Term on a Property
Purchase at Undervalue	Home Improvements
Discounted Purchase Price	No Additional Borrowing
(If applicable) £	Payment of School Fees
Estimated Monthly Rental	Release of Equity
(BTL only) £	Other Legal Purpose
Is this an Ex Pat Application Yes No	What is size of loan
BTL Occupation Type Single BTL unit HMO	Existing Balance
Multi Freehold unit	Existing Dalance

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CUSTOMER DETAILS - Applicant one ADDRESS HISTORY (A three year residential history is required)		
Customer Type Ltd Co. Partnership LLP	ADDRESS (If company please state regisered address)	
Individual SPV SPV	House name	
Title Mr Mrs Miss Ms	Number	
First Name	Postcode	
Middle Name	Residential status Owner Renting	
Surname	Living with Friends/Family	
Company Name (BTL)	Tenant-Private Tenant-Local Authority	
Company Reg. Number (BTL)	Date from	
SIC Code (BTL)	PREVIOUS ADDRESS	
Date Incorporated (BTL)	House name	
How many other names	Number	
have you been known by in the last 6 years? 0 1 2 3	Postcode	
Sex Male Female	Residential status Owner Renting	
Marital Status Single Married Divorced	Living with Friends/Family	
Civil Partnership Widowed	Tenant-Private Tenant-Local Authority	
Living with Partner Separated		
Date of Birth	Date from	
Nationality	PREVIOUS ADDRESS	
Residency Status EEA Citizen	House name	
Permanent Rights to Reside	Number	
Working Permit	Postcode	
Does your customer have Diplomatic Immunity? Yes No	Residential status Owner Renting	
Has your customer ever had any criminal convictions? Yes No	Living with Friends/Family	
Further Details	Tenant-Private Tenant-Local Authority	
Tax Status Non-taxpayer Basic rate taxpayer	Date from	
Higher or Additional rate taxpayer		

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CUSTOMER DETA	ILS - Applicant two	ADDRESS HIST (A three year res	rory sidential history is required)
Title Mr	Mrs Miss Ms	ADDRESS	
First Name		House name	
Middle Name		Number	
Surname		Postcode	
How many other names have you been known by in the last 6 years?	0 1 2 3	Residential stat	Owner Renting Living with Friends/Family
Sex	Male Female	Tenant	-Private Tenant-Local Authority
Marital Status Single	Married Divorced	Date from	
Civil Pa	artnership Widowed	PREVIOUS ADI	DRESS
Living wi	th Partner Separated	House name	
Date of Birth		Number	
Relationship to 1st applica	nt	Postcode	
Nationality		Residential stat	Owner Renting
Residency Status	EEA Citizen		Living with Friends/Family
Per	manent Rights to Reside	Tenant	-Private Tenant-Local Authority
	Working Permit	Date from	
Does your customer have Diplomatic Immunity?	Yes No	PREVIOUS ADI	DRESS
Has your customer ever ha	nd	House name	
any criminal convictions?	Yes No No	Number	
Further Details		Postcode	
Tax Status Non-taxpayer	Basic rate taxpayer	Residential stat	Owner Renting
Higher or	Additional rate taxpayer		Living with Friends/Family
		Tenant	-Private Tenant-Local Authority
		Date from	

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EMPLOYMENT DETAILS - Applicant one

EMPLOYMENT DETAILS - Applicant two

Current Employment Details

If your customer's main income is from a company that they hold a 25% or greater shareholding in then please select Self Employed

A one year employment history is required

Employment Status	Employment Status	
Employed Self-Employed Not Employed	Employed Self-Employed Not Employed	
Type of Employment	Type of Employment	
Permanent Contract	Permanent Contract	
Start Date	Start Date	
Type of Self Employment	Type of Self Employment	
LLP Partnership Ltd Co. Sole Trader	LLP Partnership Ltd Co. Sole Trader	
Start Date	Start Date	
Occupation Status	Occupation Status	
(Managment, Supervisor, Unskilled et	tc.) (Managment, Supervisor, Unskilled etc.)	
Sector	Sector	
(Accountancy, Education, Recruitment	t etc.) (Accountancy, Education, Recruitment etc.)	
Type of Not Employed	Type of Not Employed	
Unemployed Homemaker	Unemployed Homemaker	
Retired Full Time Carer	Retired Full Time Carer	
Full Time Education	Full Time Education	
Number of Previous Employments 1 2 3	Number of Previous Employments 1 2 3	
Second Job Details Please only include a second job if your Customer I at least 12 months history within this sector.		
Does your Customer currently have earnings from a second employment? Yes No	Does your Customer currently have earnings from a second employment? Yes No	

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INCOME DETAILS - Applicant one

INCOME DETAILS - Applicant two

Please ensure that the details entered match the Income and Expenditure Form.

We accept car allowance, housing allowance, shift allowance and London/large town allowance.

GROSS ANNUAL INCOME			GROSS ANNUAL INCOME		
Salary	£		Salary	£	
Commission	€		Commission	£	
Regular Bonus	€		Regular Bonus	£	
Non-Regular Bonus	€		Non-Regular Bonus	£	
Overtime	€		Overtime	£	
Pension	€		Pension	£	
Allowances	€		Allowances	£	
Maintenance	€		Maintenance	£	
Dividends	€		Dividends	£	
Investment Income/Rental F	Profit £		Investment Income/Rental F	Profit £	
Second Job Income	€		Second Job Income	£	
Benefits	€		Benefits	£	
Total	€		Total	£	
Expected Retirement Age	Years		Expected Retirement Age	Years	
Does the loan term extend in your anticipated retirement a		Yes No	Does the loan term extend in your anticipated retirement a		Yes No
Pension Income	£		Pension Income	£	
State Pension Income	£		State Pension Income	£	
Investment Income	£		Investment Income	£	
Rental Income from Unencumbered Property	£		Rental Income from Unencumbered Property	£	
Rental Income from Mortgaged Property	€		Rental Income from Mortgaged Property	€	

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EXPENDITURE DETAILS - Applicant one		EXPENDITURE DETAILS - Applicant two		
Number of Financial Dependant	s Under 18	Number of Financial Dependant	s Under 18	
Number of Financial Dependant	s Over 18	Number of Financial Dependant	s Over 18	
Ground rent and		Ground rent and		
Service charges	£	Service charges	£	
Personal Goods	£	Personal Goods	€	
Council Tax	٤	Council Tax	٤ 📗	
Utility/Telephone Bills	€	Utility/Telephone Bills	€	
Clothing	€	Clothing	€	
Insurances	€	Insurances	€	
Maintenance/CCJ/Default or		Maintenance/CCJ/Default or		
Debt Management Repayments	£	Debt Management Repayments	£	
Childcare/School/		Childcare/School/		
University Fees	£	University Fees	5	
Student Loans	٤	Student Loans	€	
Household Goods	٤	Household Goods	٤	
Housekeeping		Housekeeping		
(Food & Washing)	£	(Food & Washing)	£	
Entertainment	€	Entertainment	€	
Travel	5	Travel	€	
Interest Only Repayment		Interest Only Repayment		
Strategies	£	Strategies	£	
Monthly Savings Payments	5	Monthly Savings Payments	£	
Is the customer aware		Is the customer aware		
of any future changes		of any future changes		
to income/expenditure	Yes No	to income/expenditure	Yes No	

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MONTHLY EXPENDITURE ON-GOING CREDIT COMMITMENTS Applicant one

MONTHLY EXPENDITURE - ON-GOING CREDIT COMMITMENTS - Applicant two

If both customers are jointly responsible for a Credit Commitment please ONLY input details under one applicant. If BTL mortgage, please input under Secured Loans. All other mortgages including further advance and second charge should be input as Existing Mortgages

MONTHLY CREDIT COMMITM	MENT OUTGOINGS	MONTHLY CREDIT COMMITM	IENT OUTGOINGS
Credit Cards		Credit Cards	
Payment £		Payment £	
Balance £		Balance £	
Provider		Provider	
Personal Loans		Personal Loans	
Payment £		Payment £	
Balance £		Balance £	
Lender/Provider		Lender/Provider	
Secured Loans		Secured Loans	
Payment £		Payment £	
Balance £		Balance £	
Lender/Provider		Lender/Provider	
Finance Agreements		Finance Agreements	
Payment £		Payment £	
Balance £		Balance £	
Lender/Provider		Lender/Provider	
Evipting Mortgage		Eviating Mortgages	
Existing Mortgages Payment £		Existing Mortgages Payment £	
Balance £		Balance £	
Lender		Lender	

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DEBT CONSOLIDATION Applicant one

Please select from the list below if any debts are being consolidated.

MONTHLY CREDIT COMMITMENT OUTGOINGS

DEBT	CONSOL	LIDATION
Applic	ant two	

Please select from the list below if any debts are being consolidated.

MONTHLY CREDIT COMMITMENT OUTGOINGS

Credit Cards	 Credit Cards	
Payment £	Payment £	
Balance £	Balance £	
Provider	Provider	
Personal Loans	Personal Loans	
Payment £	Payment £	
Balance £	Balance £	
Lender/Provider	Lender/Provider	
Secured Loans	Secured Loans	
Payment £	Payment £	
Balance £	Balance £	
Lender/Provider	Lender/Provider	
Finance Agreements	Finance Agreements	
Payment £	Payment £	
Balance £	Balance £	
Lender/Provider	Lender/Provider	
Existing Mortgages	Existing Mortgages	
Payment £	Payment £	
Balance £	Balance £	
Lender	Lender	

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ADDITIONAL NOTES			

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