The mortgage works

Offline Data Capture

This form is for intermediaries' internal use only and is not approved for issuing to customer(s). The information on this form may be used to assist the intermediary if an application is made to The Mortgage Works. Before you complete this form for the applicant, please make sure they have seen 'How The Mortgage Works and Nationwide use your information' by visiting **themortgageworks.co.uk/intermediaries/cookies-privacy**

This section to be comp	pleted by the I	ntroducer (if	applicable)
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First name	Panel number (if known)
Surname	Telephone number
Company name	Email Address
Address	Firm FCA/PRA ref. no.
	Appointed representatives No Yes
	Name of principal
Postcode	Principal FCA/PRA
Network/Club if	firm ref. no.
applicable	Address of principal
Packager if applicable	
Amount of booking fee being collected?	
(if applicable)	Postcode
Amount of valuation fee being collected?	Email Address
When is fee payable? On application On completion	Telephone number
Will you be charging the applicant(s) a fee? Yes No	
Amount of fee? £	
When is the fee payable?	
On application On offer On completion	
Is the fee refundable? Yes No	
Amount of fee refundable? £	
Will a third party be charging the applicants a fee for arranging this r charged, name of the organisation, whether the fee is payable on a	mortgage? Yes No If yes, please state below the fee pplication or completion and under which terms a refund will be made:
Fee £	Fee £
Organisation	Organisation
When payable	When payable
Refund terms	Refund terms
Are procuration fees to be shared with any other person or organi	isation? Yes No
If yes please state amount	and name/organisation
£	
Have you met the applicant(s)? Yes No	
Has mortgage advice been given? Yes No	
Who provided the advice?	
processing documentation to me by email.	0% secure. However, my client(s) request that you send their mongage
	rom the FCA/PRA to advise (where applicable), complete and submit
this application on behalf of my/our clients.	
I confirm that all documents provided, whether electronically attac	hed or posted, are genuine copies or photographic images of the
original documents that have been seen by me and (where approx	priate) my client(s) have authorised me to take and provide you with
photographic images of the documents provided.	
Any fee received from The Mortgage Works solely relates to the in	atraduction of the mortgage I can confirm that I have referred to The
Mortgage Works Lending Policy, relating to the application, proper	
Mortgage Works Lending Policy, relating to the application, proper	

First Applicant and Second Applicant Persona	l Details	
Applicant(s) Personal Details	First Applicant Director Director/Shareholder	Second Applicant Director Director/Shareholder Shareholder
Title		
First name		
Middle name(s)		
Surname		
Gender	Male Female	Male Female
Date of birth		
Marital status	Single Married/Civil Partner Widow/er Divorced	Single Married/Civil Partner
Nationality		
Does your client have dual nationality?	Yes No	Yes No
If yes, which country? (the dual nationality country must be different to nationality)		
Country of birth		
What type of buyer are you?	First time landlordImage: Constraint of the second sec	First time landlord
If a first time landlord (and not a Let to Buy application) or an experienced landlord and they solely/jointly own only 1 mortgaged BTL property and no unencumbered properties, is the property inherited?	Yes No	Yes No
If a first time landlord (and not a Let to Buy application) or an experienced landlord and they solely/jointly own only 1 mortgaged BTL property and no unencumbered properties, have you or a related person ever lived in the property?	Yes No	Yes No
Has client ever been known by another name in the last three years?	Yes No If yes, please state below Mr Mrs Miss Other Other (specify)	Yes No If yes, please state below Mr Mrs Miss Other Other (specify)
Applicant(s) Current Address Details		
	First Applicant	Second Applicant
Address		

	Postcode	 Postcode	
Country			
Residential status at current address	Joint tenant	Joint tenant	
	Single tenant	Single tenant	
	Owner with mortgage	Owner with mortgage	
	Owner without mortgage	Owner without mortgage	
	Living with friends	Living with friends	
	Living with partner	Living with partner	
	Living with relatives	Living with relatives	
Date moved in MM/YYYY		DDMMYYYY	

Applicant(s) Current Address Details (continued)

First Applicant

Second Applicant

If 'owner with mortgage' or 'owner without mortgage' and purchasing a new property, please complete the following 4 questions:

Current property value of this address	£	
Type of property	House detached	Flat purpose built
Number of bedrooms		
Outstanding mortgage balance	£	
Telephone numbers (including area code)	Work	Work Home Mobile
Please state a convenient time to contact	am _ pm _ at home _ at work _	am pm at home at work
Email address		
Preferred method of contact		
Do the applicant(s) prefer correspondence in a special format?	Audio CD Braille Large Print	Audio CD Braille Large Print
Are the applicants' or directors' current addresses to be used as their correspondence address?	Yes No	Yes No
If the answer is no, please give the correspondence address below, along with the reason.		
Address	Postcode	Postcode
Country		
Reason		
Home phone number		
Work phone numbe		
Mobile phone number		
Email address		
Preferred method of contact		
Please tell the applicant we'll sometimes use thi application, or tell them something important ab		get in touch with them about their
Please provide a full 3 year address history, d	ating back 3 calendar years, starting with	the most recent address.

riedse provide a full 5 year address filstory, d	ating back 5 calendal years, starting with	the most recent address.

Previous address and postcode		
	Postcode	Postcode
Date moved in MM/YYYY	MMYYYY	MMYYYY

Applicant(s) Current Address Details (continue	ed)	
	First Applicant	Second Applicant
Residential status at previous address	Joint tenantSingle tenantOwner with mortgageOwner without mortgageLiving with friendsLiving with partnerLiving with relatives	Joint tenantSingle tenantOwner with mortgageOwner without mortgageLiving with friendsLiving with partnerLiving with relatives
Previous address and postcode	Postcode	Postcode
Date moved in MM/YYYY	MMYYYY	MMYYYY
Residential status at previous address	Joint tenant	Joint tenantSingle tenantOwner with mortgageOwner without mortgageLiving with friendsLiving with partnerLiving with relatives
Income Details		
	First Applicant	Second Applicant
Gross annual rental income	£	£
Does the applicant receive an income from any sources other than rental?	Yes No	Yes 🗌 No 🗌
If Yes please provide the annual income from this source	£	٤
Employment status	EmployedSelf-employedRetiredHouse personNot working	EmployedSelf-employedRetiredHouse personNot working
Employed Applicants/Directors		
	First Applicant	Second Applicant
Employers name		
Job role		
Industry		
Gross annual income from employment	٤	£
Job Title		
Employers Address	Postcode	Postcode

Months

Years

Months

Length of employment

Years

Self-employed Applicants/Directors

	First Applicant	Second Applicant
Name of business		
Job role		
Industry		
Annual income from self employment	£	٤
Please only complete these questions if you ar	e a Director:	
How many directorships do you currently hold?		
Please provide the taxable income figure	£	٤
If accountant's reference selected please provide your accountant's name		
Please provide accountants email		
Retired Applicants		
Annual pension income	£	٤
Name of previous employer		
Previous employer's business type (e.g. financial services/construction/public sector)		
Previous job title		

Company Details (only for applications in company names - this section must be fully completed)

We only accept applications from UK Limited companies where the Directors undertake to restrict the company's activities to the buying, selling and renting of residential investment properties. Layered companies are not eligible. Personal guarantees are required from all beneficial owners in all cases.

Company name			
Registered office			
Will this be your correspondence address?	Yes	No	If no please give details in section xx
Trading address			
If the registered and trading addresses are different, please provide an explanation			
Company registration number			
Telephone number (inc. area code)			
Is the company a Special Purpose Vehicle (SPV) set up solely for the purpose of buying, letting and selling of residential property?	Yes	No	If Yes, please answer question xx
			y will have one or more Standard Industrial Classification (SIC) code(s) f the following SIC codes: 68100, 68201, 68209, 68320
Does the SPV only have one or more of the above SIC codes associated with it?	Yes	No	
Does the SPV have any commercial property/ assets within it?	Yes	No	
Nature of Business			
Date incorporated			
Please list all directors and shareholders of the company and list the percentage of issued shares they hold			% %

Portfolio Details

	First Applicant		Se	Second Applicant		
 Please confirm the number of Buy to Let properties on completion of this mortgage including: Those held in a limited company Any TMW purchase or let-to-buy application in progress 	Number of properties on completion: Mortgaged		Mo Ur Th so	Number of properties on completion: Mortgaged Unencumbered These can be held by the applicant(s) solely or jointly, or with a 3rd party not linked to this application.		
Total estimated value of portfolio	£					
Total borrowing secured against the portfolio	£					
Mortgage Details						
Is this application for a regulated mortgage?	Regulated Non regu	ulated/ Con	sumer B	uy to Let		
Loan purpose	House purchase Remortgage Remortgage capital raising		Re	mortgage apital raising]]]	
Loan amount required	£					
How do you want to pay the product fee?	Add to Ioan Deduct f	rom advanc	e 🗌			
Product	Product code		Inter	rest rate		
Loan term (years)						
Repayment basis	Repayment £		Inter	rest only £		
Purchase applications						
Purchase price of the security	£					
Estimated value	£				_	
Please state the source(s) of deposit	UK Savings Amount Equity / sales proceeds Address of property		Amoun	t £		
	Inheritance Amount		Amoun	t £		
	Non repayable gift		from			
			Amoun	t £		
	UK stocks / shares Amount Overseas savings /		Amoun		_	
	stocks / shares		Amoun		_	
	Business / company Please provide details:		Amoun	ل <u>ک</u>	_	
	Business / company name					
	Intercompany loan Amount		Amoun	t £		
	Name of the Company prov	viding funds				
	Vendor cashback*		Amoun			
	Builder's cashback* *only one may be selected		Amoun	t £	_	
Is the property vendor a limited company?	Yes No				_	
Is the property being sold via an estate agent?	Yes No					
If the property isn't being sold via an estate age	ent, please provide the follow	ing details:				
Does the vendor intend to reside in the property after completion?	Yes No					
What's the clients relationship to the vendor?					_	
Will the property be purchased at full market value?	Yes No					
How was the property sourced?						

Is full vacant possession being obtained on completion?	Yes No			
Is the vendor a limited company?	Yes No			
If yes, what is the company name and company address				
Business Type (e.g financial services/construction/public sector)				
Are you connected to this company?	Yes No			
Remortgage/ Remortgage with capital raising a	pplications			
Date of purchase				
Original Purchase Price	£			
Was the property purchased from a Limited Company?	Yes No (If yes, pl	ease provi	de the na	me of the Limited Company.
	Are you connected to this	limited co	mpany? Y	es No 🗌
Estimated value of the security	£			
Total value of existing mortgage to be repaid (please include all lending secured against the property)	£			
Is this a let to buy application?	Yes No			
(if applicable):	Amount of capital raising (Please confirm purpose of Debt consolidation Home improvements (security address)			£
	Provide a description of th Home improvements (other property)	ne improve		
	Provide a description of th	ie improve	ments	
	Property purchase		Amount	
	Purchase of land		Amount	
	Transfer of equity Purchase of final share		Amount	
	(shared ownership) Other		Amount Amount	
	If other, please provide de	tails		
Let to Buy - only complete this section for Let to				
Does the applicant have an onward residential address?	Yes No			
Is the onward residential purchase being fully or partially funded by a mortgage?	Yes No			
The Let to Buy onward residential address:				
Please confirm the purchase price of the onward residential purchase	£			
Selling agent's name				
Porting – only complete this section if you are po	orting			
Mortgage account number for the product to be ported				
Loan amount to be ported / loan term (years)				
Additional borrowing product code	t			
Additional borrowing amount / loan term (years)				

Director Residential Purchase	
Does the Director/Shareholder(s) have an onward residential address?	Yes 🗌 No 🗌
Will the Director/Shareholder(s) be renting their onward residential address?	Yes 🗌 No 🗌
Onward Residential address	
Purchase price of the onward residential address	£
Selling agents name	
New Company Address	
Is the property purchase address currently used as the company's registered address?	Yes 🗌 No 🗌
New registered address for the company	
Property Details	
Does the property have a valid Energy Performance Certificate (EPC) that satisfies current regulation for a private rented property?	Yes No No Here a valid Energy The Mortgage Works requires private rented properties to have a valid Energy Performance Certificate (EPC). Please visit the website themortgageworks.co.uk for further information.
Property address	
Is the property an HMO?	Yes No .
Type of property	House detachedFlat purpose builtHouse semi-detachedFlat convertedHouse mid-terraceFlat studioHouse end-terraceMaisonette purpose builtBungalow detachedMaisonette convertedBungalow semi-detachedHouse end-terraceBungalow mid-terraceHouse end-terraceBungalow end-terraceHouse end-terrace <t< td=""></t<>
Tenure	Freehold 🗌 Leasehold 🗌 Ownership Scotland 🗌 Commonhold 🗌
If leasehold – unexpired lease term	
– annual ground rent	£
– annual service charge	£
Is the property a new build?	Yes 🗌 No 🗌
Year built	
Standard construction	Yes No
Was the property ever owned by a local authority or housing association?	Yes 🗌 No 🗌
Does the property have agricultural ties?	Yes 🗌 No 🗌
Number of bedrooms (If number of bedrooms is zero (i.e. studio flat), input 1)	
Number of kitchens	
Number of reception and/ or communal rooms	
Type of garage	No garage Single Single integral Double Double integral Other
If the property is a flat or maisonette, please confirm the number of floors in the building	

Planned major works	Yes No
Please note, significant changes to the	
structure/configuration of the property such as an extension, changes to the internal walls, or	
any other works you think may be considered	
significant may impact our lending decision.	
You'll be asked to leave details of any planned works in the notes section at the end of the	
online application.	
Has the property ever been owned by the	Yes No
Local Authority?	
Tenancy Details	
What is the actual or anticipated monthly rental income?	£
Is this a corporate let?	Yes No
If this is a corporate let, please provide the name of the tenant	
How does your client intend to let	Assured Shorthold Tenancy Short Assured Tenancy
the property?	Occupation Contract Non-Standard Private Residential Tenancy
Duration of the tenancy	
Direct Debit Details	
	First Applicant Second Applicant
Account number	
Sort code (xx-xx-xx)	
Name(s) of account holder(s)	
Conveyancer Details	
Name of firm	
Address	
Name of contact	
E-mail address	
Telephone number	
Sole practitioner	Yes No No
Valuation and Access Details	
	Valuation for mortgage 🔄 Home Survey Level 2 and Valuation 🗌
Type of valuation required	Home Survey Level 3 Specialist Security Valuation
Property access contact	
Address	
Contact telephone number	
Secondary contact telephone number	
Valuation / access (other contact details)	Is this the selling agent Yes No
	Is this the managing agent? Yes No No I If no, please provide the following details for the managing / selling agent
	Company name:
	Address/postcode:
	Telephone number:
	NOTE: This information may help us with gaining access to the property to carry
	out the valuation

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themortgageworks.co.uk

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