

# The mortgage works

## This section to be completed by the Introducer

First name	<input type="text"/>	Panel number (if known)	<input type="text"/>
Surname	<input type="text"/>	Telephone number	<input type="text"/>
Company name	<input type="text"/>	Email Address	<input type="text"/>
Address	<input type="text"/>	Firm FCA/PRA ref. no.	<input type="text"/>
	<input type="text"/>	Appointed representatives	Yes <input type="checkbox"/> No <input type="checkbox"/>
	<input type="text"/>	Name of principal	<input type="text"/>
	<input type="text"/>	Principal FCA/PRA firm ref. no.	<input type="text"/>
	<input type="text"/>	Address of principal	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
Network/Club if applicable	<input type="text"/>		<input type="text"/>
Packager if applicable	<input type="text"/>		<input type="text"/>
Will you be charging the applicant(s) a fee?	Yes <input type="checkbox"/> No <input type="checkbox"/>		<input type="text"/>
Amount of fee?	£ <input type="text"/>	Email address	<input type="text"/>
When is fee payable?		Telephone number	<input type="text"/>
On application <input type="checkbox"/> On offer <input type="checkbox"/> On completion <input type="checkbox"/>			
Amount of fee refundable?	£ <input type="text"/>		
Have you met the applicant(s)	Yes <input type="checkbox"/> No <input type="checkbox"/>		
Has mortgage advice been given?	Yes <input type="checkbox"/> No <input type="checkbox"/>		

Please note The Mortgage Works only accepts advised sales on regulated mortgage contracts.

Who provided the advice?

I hereby confirm and declare that:

1. I have been instructed by the applicant(s) named in this application to complete this application for and on behalf of them.
2. The information in this application and the answers given are those provided by the applicant(s) and to the best of my knowledge are true. I am aware and I have made the applicant(s) aware that it is a criminal offence to knowingly supply false information to obtain a mortgage.
3. I understand that you will rely on this information when deciding to proceed with the change and I will make good any loss that you may suffer as a result of any incorrect or misleading information that I have provided you.
4. I undertake to notify you as soon as I become aware that any information in this application ceases to be true, accurate or complete.
5. I have
  - a) outlined the nature of this change to the applicant(s) and
  - b) explained the nature and amount of the fees payable by the applicant(s) and I have confirmed with the applicant(s) which fees are not refundable even if you do not effect the change or the change does not proceed for any other reason.
6. I have advised the applicant(s) that you may disclose details about the progress of their application, including whether or not it has been granted, and details of any complaints they make prior to completion, to me if I request it.
7. I undertake to provide you with all the documentary evidence that you require to support the information contained in this application.
8. I confirm that, if the term of the mortgage continues after the applicant(s) actual or anticipated retirement, a full explanation has been given by the applicant(s) as to how the mortgage will be funded in retirement before I submitted this application.
9. I confirm that all documents provided, whether electronically attached or posted, are genuine copies or photographic images of the original documents that have been seen by me and (where appropriate) my client(s) have authorised me to take and provide you with photographic images of the documents provided.

Signature of Introducer

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Print Name

# Residential & MCOB Regulated BTL Application Form: Porting

Before you complete this form, please see 'How The Mortgage Works and Nationwide use your information' by visiting [themortgageworks.co.uk/cookies-privacy](https://www.themortgageworks.co.uk/cookies-privacy). If you're a broker completing this form on behalf of the applicant, please make sure they have understood how their information will be used.

## 1. Applicant Identity

### Forms of Identification

To comply with Anti Money Laundering regulations we will undertake checks to verify the identity and the current and previous address(es) of all applicants.

These checks will be made electronically. However, where we are unable to satisfy the regulations or the Group policy electronically, physical proof of identity and all necessary addresses will be required.

## 2. Applicant's personal details

	First Applicant	Second Applicant
Title	<input type="text"/>	<input type="text"/>
Forenames	<input type="text"/>	<input type="text"/>
Middle name	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text" value="DDMMYYYY"/>	<input type="text" value="DDMMYYYY"/>
Gender	Male <input type="checkbox"/> Female <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>
Have you been known by another name in the last three years?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please state below Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, please state below Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>
	Forenames <input type="text"/>	Forenames <input type="text"/>
	Surname <input type="text"/>	Surname <input type="text"/>
	From <input type="text" value="DDMMYYYY"/> To <input type="text" value="DDMMYYYY"/>	From <input type="text" value="DDMMYYYY"/> To <input type="text" value="DDMMYYYY"/>
Nationality	<input type="text"/>	<input type="text"/>
Country of birth	<input type="text"/>	<input type="text"/>
Does the applicant have dual nationality? If yes, please confirm the applicant's dual nationality	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/>
Current address including postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode <input type="text"/>
Date you moved in	<input type="text" value="DDMMYYYY"/>	<input type="text" value="DDMMYYYY"/>
Will this be your correspondence address?	Yes <input type="checkbox"/> No <input type="checkbox"/> If no please give details in section 15	Yes <input type="checkbox"/> No <input type="checkbox"/> If no please give details in section 15

## 2. Applicant's personal details (continued)

	First Applicant	Second Applicant
Residential status at current address	Joint tenant <input type="checkbox"/>	Joint tenant <input type="checkbox"/>
	Single tenant <input type="checkbox"/>	Single tenant <input type="checkbox"/>
	Owner with mortgage <input type="checkbox"/>	Owner with mortgage <input type="checkbox"/>
	Owner without mortgage <input type="checkbox"/>	Owner without mortgage <input type="checkbox"/>
	Living with friends <input type="checkbox"/>	Living with friends <input type="checkbox"/>
	Living with relatives <input type="checkbox"/>	Living with relatives <input type="checkbox"/>

### Telephone numbers

Home	<input type="text"/>	<input type="text"/>
Work	<input type="text"/>	<input type="text"/>
Mobile	<input type="text"/>	<input type="text"/>

### Email address

<input type="text"/>	<input type="text"/>
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We'll sometimes use this email address and/or phone number(s) to get in touch with you about your application, or tell you something important about your account. If you're a broker completing this form on behalf of the applicant, please ensure they're made aware of this.

Preferred contact method	Home <input type="checkbox"/> Mobile <input type="checkbox"/> Work <input type="checkbox"/> Email <input type="checkbox"/>	Home <input type="checkbox"/> Mobile <input type="checkbox"/> Work <input type="checkbox"/> Email <input type="checkbox"/>
	Postal mail <input type="checkbox"/>	Postal mail <input type="checkbox"/>

Do the applicant(s) prefer correspondence in a special format?	Audio CD <input type="checkbox"/> Braille <input type="checkbox"/> Large print <input type="checkbox"/>	Audio CD <input type="checkbox"/> Braille <input type="checkbox"/> Large print <input type="checkbox"/>
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Please provide a full three years address history, starting with the most recent address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/> Postcode <input type="text"/>	<input type="text"/> Postcode <input type="text"/>

Date you moved in to your previous address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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If you have had more than one previous address in the last three years, please give full details in section 15

Residential status at previous address	Joint tenant <input type="checkbox"/> Single tenant <input type="checkbox"/>	Joint tenant <input type="checkbox"/> Single tenant <input type="checkbox"/>
	Owner with mortgage <input type="checkbox"/>	Owner with mortgage <input type="checkbox"/>
	Owner without mortgage <input type="checkbox"/>	Owner without mortgage <input type="checkbox"/>
	Living with friends <input type="checkbox"/>	Living with friends <input type="checkbox"/>
	Living with relatives <input type="checkbox"/>	Living with relatives <input type="checkbox"/>

If an owner with or without a mortgage, please advise the type of property:	House <input type="checkbox"/> Bungalow <input type="checkbox"/> Flat <input type="checkbox"/>	House <input type="checkbox"/> Bungalow <input type="checkbox"/> Flat <input type="checkbox"/>
	Maisonette <input type="checkbox"/> Detached <input type="checkbox"/>	Maisonette <input type="checkbox"/> Detached <input type="checkbox"/>
	Semi-detached <input type="checkbox"/> Mid terrace <input type="checkbox"/>	Semi-detached <input type="checkbox"/> Mid terrace <input type="checkbox"/>
	End terrace <input type="checkbox"/> Purpose built <input type="checkbox"/>	End terrace <input type="checkbox"/> Purpose built <input type="checkbox"/>
	Converted <input type="checkbox"/> Studio <input type="checkbox"/>	Converted <input type="checkbox"/> Studio <input type="checkbox"/>

Number of bedrooms	<input type="text"/>	<input type="text"/>
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Outstanding mortgage balance	£ <input type="text"/>	£ <input type="text"/>
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## 3. Retirement details

At what age do you plan to retire?	<input type="text"/>	<input type="text"/>
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## 4. Dependant details

How many financial dependants do you have in the following age groups? Where responsibility for dependants is shared please record them once under the First Applicant	Under 6 years	<input type="text"/> <input type="text"/>	Under 6 years	<input type="text"/> <input type="text"/>
	6 to 11 years	<input type="text"/> <input type="text"/>	6 to 11 years	<input type="text"/> <input type="text"/>
	12 to 17 years	<input type="text"/> <input type="text"/>	12 to 17 years	<input type="text"/> <input type="text"/>
	18 years and above	<input type="text"/> <input type="text"/>	18 years and above	<input type="text"/> <input type="text"/>

**5. Your employment and income details**

	First Applicant	Second Applicant
<b>1. Main Employment</b>		
How are you employed?	<input type="checkbox"/> Employed <input type="checkbox"/> Self Employed (Partner) <input type="checkbox"/> Self Employed (Sole Trader) <input type="checkbox"/> Director/Shareholder with 20% or less shareholding <input type="checkbox"/> Director/Shareholder with more than 20% shareholding <input type="checkbox"/> Unemployed <input type="checkbox"/> Homemaker <input type="checkbox"/> Retired <input type="checkbox"/> Student	<input type="checkbox"/> Employed <input type="checkbox"/> Self Employed (Partner) <input type="checkbox"/> Self Employed (Sole Trader) <input type="checkbox"/> Director/Shareholder with 20% or less shareholding <input type="checkbox"/> Director/Shareholder with more than 20% shareholding <input type="checkbox"/> Unemployed <input type="checkbox"/> Homemaker <input type="checkbox"/> Retired <input type="checkbox"/> Student
What is your employment type?	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary <input type="checkbox"/> Fixed Term Contract <input type="checkbox"/> Sub-Contractor Fixed Term <input type="checkbox"/> Sub-Contractor Open Ended	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary <input type="checkbox"/> Fixed Term Contract <input type="checkbox"/> Sub-Contractor Fixed Term <input type="checkbox"/> Sub-Contractor Open Ended
What is your specific job role?	<input type="text"/>	<input type="text"/>
What industry do you work in?	<input type="text"/>	<input type="text"/>
If self employed, what is the name of your business?	<input type="text"/>	<input type="text"/>
Length of service with your current employer or self-employed trading	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M
Name, address and telephone number of employer (including area code)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Postcode
Employee reference number	<input type="text"/>	<input type="text"/>
Human Resources/Personnel telephone number (inc. area code)	<input type="text"/>	<input type="text"/>
Reference/contact name	<input type="text"/>	<input type="text"/>
Date employment started. If less than 12 months please provide full details for each employer during the last 12 months in section 15	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y
Your tax office/district/reference	<input type="text"/>	<input type="text"/>
<b>Contracting Applicants</b>		
How long have you been contracting?	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M
Start date of current contract	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y
End date of current contract	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y
Has the contract been renewed?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is the contract renewable?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you paid through an Umbrella Company?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, is Tax and NI deducted by the company?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

(note if the above applies, please provide the last 3 months payslips and P60)





## 6. Other income details

	First Applicant	Second Applicant
Child benefit	£ <input type="text"/> per month	£ <input type="text"/> per month
State disability benefit	£ <input type="text"/> per month	£ <input type="text"/> per month
Some of the information you give us may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume you're happy for us to record this information and we'll only use it to help us with your application. If you're a broker completing this form on behalf of the applicant, please make sure they're made aware of this.		
Universal credit/tax credit	£ <input type="text"/> per month	£ <input type="text"/> per month
Investment income	£ <input type="text"/> per month	£ <input type="text"/> per month
Maintenance	£ <input type="text"/> per month	£ <input type="text"/> per month
Pension income	£ <input type="text"/> per month	£ <input type="text"/> per month
Pension credits	£ <input type="text"/> per month	£ <input type="text"/> per month
Rental income from a mortgage free property	£ <input type="text"/> per month	£ <input type="text"/> per month
If you have any other TMW mortgages where the property is rented, please enter the total monthly rental income.	£ <input type="text"/> per month	£ <input type="text"/> per month

Note: You don't need to provide evidence of your other monthly income with your application, we'll let you know if we require this. If any income is received and shared by both applicants only include it once, do not duplicate the amounts.

## 6a. Anticipated Retirement Income

If you are within 10 years of your intended retirement date and your loan will extend beyond this date please complete the following anticipated income details. The retirement date is the date of intended retirement age given in Section 3 (Retirement details):

Annual investment income (including dividends)	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Annual rental income	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Annual rental from a mortgage free property	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Annual pension income (including annuities)	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Annual pension credit	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Annual child benefit	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Annual state disability benefit	£ <input type="text"/> per annum	£ <input type="text"/> per annum

Some of the information you give us may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume you're happy for us to record this information and we'll only use it to help us with your application. If you're a broker completing this form on behalf of the applicant, please make sure they're made aware of this.

Annual universal credit/tax credit	£ <input type="text"/> per annum	£ <input type="text"/> per annum
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## 7. Monthly outgoing details

Total monthly childcare expenditure	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on school fees	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on CSA and/or maintenance	£ <input type="text"/> per month	£ <input type="text"/> per month
Additional monthly expenditure for financial dependants	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly travel expenditure	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on any personal loan/hire purchase with more than six months to run	£ <input type="text"/> per month	£ <input type="text"/> per month

## 7. Monthly outgoing details (continued)

Total monthly expenditure on any Deferred purchase agreements with more than six months to run (Deferred purchase agreements are buy now, pay later contracts that you have in place)	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on any secured loans with more than six months to run	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on any student loans	£ <input type="text"/> per month	£ <input type="text"/> per month
Total outstanding credit card balance	£ <input type="text"/>	£ <input type="text"/>
Any other monthly expenditure that has not been provided above?	£ <input type="text"/> per month	£ <input type="text"/> per month

Note: For any additional expenditure please enter the details in the Additional Information box in section 15.

If any outgoings are shared and paid by both applicants only include them once, do not duplicate the amounts.

Total monthly expenditure on any personal loan/hire purchase that is being cleared on or before completion	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on any Deferred purchase agreements that is being cleared on or before completion (Deferred purchase agreements are buy now, pay later contracts that you have in place)	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on any secured loans that is being cleared on or before completion	£ <input type="text"/> per month	£ <input type="text"/> per month
Total monthly expenditure on any student loans that is being cleared on or before completion	£ <input type="text"/> per month	£ <input type="text"/> per month
Total outstanding credit card balance that is being cleared on or before completion	£ <input type="text"/>	£ <input type="text"/>

Note: Include outgoings that will be cleared on or before completion

## 8. Property outgoings details

Please enter your annual payment for:

Council Tax	£ <input type="text"/> per annum
Ground Rent	£ <input type="text"/> per annum
Service Charge(s)	£ <input type="text"/> per annum
Home Insurance	£ <input type="text"/> per annum
Shared ownership rent amount	£ <input type="text"/> per annum

Note: This should be the total of all property outgoings for all applicants

## Non-TMW Mortgage Details – First applicant

Full postal address	<input type="text"/> and/or property name <input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/> Postcode
Estimated property value	£ <input type="text"/>



**8. Property outgoings details (continued)**

	Mortgage 1	Mortgage 2	Mortgage 3
Total Outstanding Balance	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Total Interest Only amount	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Term Remaining	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M
Do you let any of these properties?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, do you have a tenancy agreement in place for any of the properties you let?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Total Monthly Mortgage Payment	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Total Monthly Rental Income	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

**Non-TMW Mortgage Details – Second applicant**

Full postal address  and/or property name

Postcode

Estimated property value £

	Mortgage 1	Mortgage 2	Mortgage 3
Total Outstanding Balance	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Total Interest Only amount	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Term Remaining	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M
Do you let any of these properties?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, do you have a tenancy agreement in place for any of the properties you let?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Total Monthly Mortgage Payment	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Total Monthly Rental Income	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

	First Applicant	Second Applicant
Have you ever:		
a) missed any payments on:		
i) any credit, rental or mortgage agreement?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes in the last 2 years, have you missed payments for 3 or more months on;	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes in the last 2 years, have you missed payments for 3 or more months on;
ii) any mortgage or secured loan; or	Yes <input type="checkbox"/> No <input type="checkbox"/> Highest number of months in arrears <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> Highest number of months in arrears <input type="text"/>
iii) any unsecured loan?	Yes <input type="checkbox"/> No <input type="checkbox"/> Highest number of months in arrears <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> Highest number of months in arrears <input type="text"/>
b) had a property taken into possession voluntarily or otherwise by a lender?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
c) had any application for credit or mortgage refused?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

If the answer to any of the questions is yes, please provide full details in section 15

## 9. Portfolio Details - buy to let applications only

What type of buyer is the applicant?

First time landlord  Experienced landlord

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 applications in progress

Mortgaged


Unencumbered


Held jointly by applicant 1 and applicant 2

Held by applicant 1 solely, or jointly with someone other than applicant 2

Held by applicant 2 solely, or jointly with someone other than applicant 1

Where the total of mortgaged properties is equal to or greater than 4, complete the following:

Total value of existing portfolio: £

Total secured borrowing within the existing portfolio: £

- Include properties held by all applicants
- Include properties held solely, jointly, with a 3rd party or in a limited company
- Do not include purchase or let-to-buy applications in progress

If a first time landlord (and NOT a Let to Buy application) or an experienced landlord who solely/jointly owns only 1 mortgaged BTL property and no unencumbered properties, is the property inherited?

Yes  No

If a first time landlord (and NOT a Let to Buy application) or an experienced landlord who solely/jointly owns only 1 mortgaged BTL property and no unencumbered properties, have you or a related person ever lived in the property?

Yes  No

## 10. Loan requirements

### Name and address of property to be mortgaged

Property number

and/or property name

Street

Town

Postcode

Loan purpose

Purchase  Remortgage  Remortgage capital raising

Term required (cannot be more than current loan)

Additional borrowing product code (if required)

Repayment basis

Interest only  Repayment  Part & part

If part & part: Interest only amount £

Repayment amount £

Mortgage account number for the product to be ported

Loan

Loan amount to be ported £

Total loan amount £

Purchase Price £  Estimated Value £

How do you want to pay the product fee (if applicable)?

Add to loan  Deduct from advance

Sale price of existing security

£

The application will be processed using the existing balance of the account. If you intend to make a capital repayment as part of this transaction, please advise the mortgage balance that will apply upon the change of property.

£

(Please also provide evidence of the source of funds used to make the capital repayment)

The application will be processed using the remaining term of your account. If you require a lesser term upon the change of borrower, please advise the term that will remain (full years only):

Term  Year(s)

**10. Loan requirements (continued)**

Please select the mortgage Repayment Vehicle from the approved list below:

Capital from trust funds	<input type="checkbox"/>	Amount	£ <input type="text"/>
Endowment policy	<input type="checkbox"/>	Amount	£ <input type="text"/>
ISA Amount	<input type="checkbox"/>	Amount	£ <input type="text"/>
Pension plan	<input type="checkbox"/>	Amount	£ <input type="text"/>
Premium bonds	<input type="checkbox"/>	Amount	£ <input type="text"/>
Existing stocks and shares ISA (Formerly known as PEBS)	<input type="checkbox"/>	Amount	£ <input type="text"/>
UK FTSE Listed securities and shares	<input type="checkbox"/>	Amount	£ <input type="text"/>
Unit & Investment trusts	<input type="checkbox"/>	Amount	£ <input type="text"/>

Other (please give full details below)

Please advise whether the vehicle has changed since the original application and give a reason for this

**For remortgages only:**

Amount required for capital raising

£

If capital raising, please select the purpose:

Debt consolidation  Home improvements (at the security address)

Home improvements (at another property)

Provide a brief description of improvements

Property purchase  Purchase of land  Transfer of equity

Purchase of final share (shared ownership)

Other

Are you obtaining any other loan or assistance towards the purchase price (including any financial incentive from builder/vendor)?

Yes  No  Amount £

If yes, please provide details:

Please enter the source(s) of deposit (for purchase applications):

UK savings	<input type="checkbox"/>	Amount	£ <input type="text"/>
Equity	<input type="checkbox"/>	Amount	£ <input type="text"/>
Inheritance	<input type="checkbox"/>	Amount	£ <input type="text"/>
Gift	<input type="checkbox"/>	Amount	£ <input type="text"/>
UK stocks/shares	<input type="checkbox"/>	Amount	£ <input type="text"/>
Overseas savings/stocks/shares	<input type="checkbox"/>	Amount	£ <input type="text"/>
Business/company with option to complete the 'Name' Vendor cashback	<input type="checkbox"/>	Amount	£ <input type="text"/>
Builder cashback	<input type="checkbox"/>	Amount	£ <input type="text"/>

Is the vendor a relative or are you connected to the vendor?

Yes  No  If yes, please provide details of your relationship to the vendor

Is the vendor a limited company?

Yes  No  If yes, please provide details:

Are you connected to this limited company? Yes  No

If yes, TMW is unable to offer a mortgage

## 10. Loan requirements (continued)

Is the property being sold via an estate agent?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If the property is <b>NOT</b> being sold via an estate agent:	If no, is the vendor a relative or are you connected to the vendor? Yes <input type="checkbox"/> No <input type="checkbox"/>
Does the vendor intend to reside in the property after completion?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Will the property be purchased at full market value?	Yes <input type="checkbox"/> No <input type="checkbox"/>
How was the property sourced?	<input type="text"/>
Is this a let to buy application? If <b>NO</b> , do not answer the questions below.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Let to buy onward residential address	If yes: Does the applicant have an onward residential address? Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/> <input type="text"/>
Is the onward residential purchase being fully or partially funded by a mortgage?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Please confirm the purchase price of the onward residential purchase?	£ <input type="text"/>
Selling agents name	<input type="text"/>

## 11. Property description

Does the property have a valid Energy Performance Certificate (EPC) that satisfies current regulation for a private rented property?	Yes <input type="checkbox"/> No <input type="checkbox"/> The Mortgage Works requires private rented properties to have a valid Energy Performance Certificate (EPC). Please visit <a href="http://themortgageworks.co.uk">themortgageworks.co.uk</a> for further information.
Type of property:	House <input type="checkbox"/> Detached <input type="checkbox"/> Semi-detached <input type="checkbox"/> Bungalow <input type="checkbox"/> End of terrace <input type="checkbox"/> Terraced <input type="checkbox"/> Purpose built flat/maisonette <input type="checkbox"/> Converted flat/maisonette <input type="checkbox"/> Studio flat <input type="checkbox"/> If studio flat, how many square metres? <input type="text"/>

**(The Mortgage Works does not currently lend on studio flats with an internal area of less than 30 square metres and studio flats without a separate bathroom)**

Is the property an HMO?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is the property a Newbuild?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If remortgage/ remortgage with capital raising please provide the date of purchase	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Tenure	Freehold <input type="checkbox"/> Leasehold <input type="checkbox"/> Commonhold <input type="checkbox"/> Ownership Scotland <input type="checkbox"/>
Leasehold property	If leasehold – unexpired lease term: <input type="text"/> a) If leasehold – Annual ground rent <input type="text"/> £ <input type="text"/> Annual service charge <input type="text"/> £ <input type="text"/> b) If leasehold, will/do you also own the freehold/shares in the management company that owns the freehold? Yes <input type="checkbox"/> No <input type="checkbox"/>
Year built	<input type="text"/> a) If under 10 years old, is a NHBC, Foundation or Architect certificate available Yes <input type="checkbox"/> No <input type="checkbox"/> (or other please specify)? Other <input type="text"/> b) If under 10 years old, please state name of builder/developer if known: <input type="text"/> c) Is the property under construction? Yes <input type="checkbox"/> No <input type="checkbox"/>

**If yes, please contact The Mortgage Works before proceeding**

## 11. Property description (continued)

Is the property of standard construction? Yes  No  If no, please provide details:

Type of construction

Walls/roof (e.g. brick/tile)  /

Other (please specify)

Accommodation (specify number of rooms)

Reception and Communal rooms

Bedrooms (if number of bedrooms is zero (i.e. studio flat), input 1)

Kitchen

Type of garage

No garage  Single  Single integral  Double  Double integral

Other

If the property is a flat/maisonette, was the property ever owned by a local authority or housing association?

Yes  No

If the property is a flat/maisonette

a) How many floors does the building have?

b) was the property ever owned by a local authority or housing association?

Yes  No

How do you intend to let the property?

Duration of tenancy

Is this a corporate let?

Yes  No  Please ensure that you have reviewed our lending criteria

If yes, what's the name of the tenant

Does the property have agricultural ties?

Yes  No

Is the property to be mortgaged situated in Scotland?

Yes  No

If Scottish purchase, please confirm date of entry:

Proposed/current occupants of the property over 17 years of age:

Full name

Date of birth

Relationship to applicants

Full name

Date of birth

Relationship to applicants

Full name

Date of birth

Relationship to applicants

## 12. Valuation/survey requirements

Property access contact details for the valuer.

Please provide name of agency (if applicable), contact name/address (inc. postcode), telephone number and secondary contact telephone number

Is this the selling/ managing agent?

Yes  No

If yes, please provide the following details for the selling/managing agent

Selling agent  Managing agent

Name of contact/company name

**12. Valuation/survey requirements (continued)**

Address	<input type="text"/> <input type="text"/> <input type="text" value="Postcode"/>
Telephone number	<input type="text"/>
Type of valuation/survey required:	Valuation for mortgage purposes <input type="checkbox"/> Home Survey Level 2 Report and Valuation <input type="checkbox"/> Home Survey Level 3 Report <input type="checkbox"/> Specialist security valuation (for HMO applications) <input type="checkbox"/>
Amount of application fee enclosed (if applicable)	£ <input type="text"/>

**13. Your solicitor/conveyancer's details**

Name /address (including postcode) and contact details of solicitors/conveyancers	Contact name	<input type="text"/>
	Company name	<input type="text"/>
	Address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text" value="Postcode"/>
	Tel	<input type="text"/>
	Email	<input type="text"/>

**14. Your solicitors/conveyancers**

We will normally use the same firm that you have nominated. If we are unable to use them we will instruct a separate firm to act on our behalf and deduct their costs from the loan. Licensed conveyancers and solicitors with less than two partners will not be eligible to process applications for The Mortgage Works unless they are on our approved panel. We will require solicitors to act on our behalf in all circumstances.

**15. Continuation section – (Please cross reference your answers with the relevant question numbers)**

Some of the information you give us may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume you're happy for us to record this information and we'll only use it to help us with your application. If you're a broker completing this form on behalf of the applicant, please make sure they're made aware of this.

Question number	Detail

Please use the back page and/or a continuation sheet if necessary

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## 16. Property insurance

It is not a condition of your mortgage that you arrange your buildings insurance through The Mortgage Works. You can instead arrange it independently – if you do, it is important that the sum insured is at least equal to the amount advised by the valuer who carried out the valuation on your property. Our interest as mortgagee must also be noted on the policy.

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## 17. Use of my information

1. The information you have provided will be held by The Mortgage Works and Nationwide. Further details on how your information will be used is available at [themortgageworks.co.uk/cookies-privacy](https://themortgageworks.co.uk/cookies-privacy)
2. We collect and use your information so we can offer and manage your accounts, confirm your ID, prevent fraud, provide services to you, collect and recover debt and run our business.
3. We share your information as necessary within The Mortgage Works and Nationwide, with our suppliers and with any third parties you've asked to act on your behalf. Information is shared with our insurance partners when applying for a Nationwide insurance product or it is a benefit of your account (e.g. FlexPlus).
4. If the law requires or allows us to, we'll also share information as necessary with other organisations. This includes credit reference agencies, fraud prevention agencies and other government bodies, regulators and law enforcement agencies.
5. When we share your information with credit reference agencies they'll use this to check your credit rating, along with the other details you've given us. These checks are part of most account application processes – however, they will leave a record on your credit file that other lenders can see. This might affect your ability to get credit elsewhere for a short while.
6. When we share your information with fraud prevention agencies they will use the data to prevent fraud and money laundering and verify your identity. If we believe someone poses a fraud or money laundering risk, we may refuse to provide the product they have asked for and we may also stop providing services they already have. The fraud prevention agencies will keep a record of any fraud or money laundering risk and this could mean that other organisations may refuse to provide services, financing or employment.
7. When we transfer information to third parties and organisations, whether inside or outside the UK, we'll make sure we only give them information that's necessary and that your data will stay secure.
8. We may, if applicable, give the Intermediary who introduces this mortgage application to you, a copy of any offer we make or the reason for declining the application, a copy of any valuation we ask to be carried out, details of any complaints you make before completion and any other information we consider necessary to process your application through to completion.
9. We only use your information if we have a legal basis to do so, for example, if you have given us consent or if we need to use the information to meet our obligations to you in our terms and conditions. We may also use your information if necessary to comply with the law or to carry out our legitimate business interests.
10. You have certain rights when it comes to your personal information including the right to access your data. Further details on these rights and who to contact are available online at [themortgageworks.co.uk/cookies-privacy](https://themortgageworks.co.uk/cookies-privacy)

By making this application, I'm confirming that the other applicant, where applicable, has agreed to share a financial relationship with me. Also, that they're happy for Nationwide to authorise searches, and for links and / or recordings of their information to be made with credit reference agencies.

## 18. Declaration

You (each of you if more than one is applying) agree and declare as follows:

1. You are aged 18 or over and the information given by you is true and complete and shall form the basis of the loan agreement between The Mortgage Works and you.
2. We will rely on the information you have given us on this form, which you confirm is complete and true. If you fail to disclose, or give false material information, this may result in any offer being withdrawn. You understand it is a criminal offence to knowingly supply false information to obtain a loan. If any information you have provided changes before completion of the advance you will tell us without delay.
3. We can decline an application at any stage without providing a reason for our decision.
4. You must have adequate buildings insurance in place which covers the cost of rebuilding the property.
5. We may disclose details about the progress of your application, including whether or not it has been granted, and details of any complaints you make prior to completion to your broker, Independent Financial Adviser, professional adviser or other intermediary, if the request came from them.
6. You are not bankrupt or insolvent.
7. If, for the purposes of this mortgage application, you have provided benefit details, The Mortgage Works may confirm these, and only these, details with the Benefits Agency.
8. It is your responsibility to ensure that you have suitable life cover or other means of repayment in place to repay the mortgage in the event of your death.
9. If repayment of your loan continues after you have retired, you have provided details of how you propose to fund the mortgage and any associated repayment vehicle, if applicable, in retirement.
10. For interest only mortgages, you have an adequate repayment strategy in place to repay the mortgage at the end of the term.
11. You are responsible for any legal costs (where applicable), fees and expenses arising out of this application whether or not an offer of advance is made and/or it proceeds to completion.
12. Fixed and tracker rates are limited offers and may be withdrawn at any time.
13. Your solicitor/licensed conveyancer can disclose to us information relevant to our decision to lend and you waive any right to claim solicitor/client confidentiality or legal professional privilege in respect of such information.
14. You have received The Mortgage Works Guide to Mortgages, the Tariff Guide, an Initial Disclosure Document or the 'Important information about our mortgage services' document and the illustration for the mortgage applied for.
15. By signing this application, I agree to the declaration. If applicable, I also agree to be bound by the terms of your charitable assignment scheme provided to me in my application, which means I will not receive a bonus if Nationwide converts to a bank.

**Mortgages are secured on your property. You could lose your property if you do not keep up payments on your mortgage.**

**All applicants must sign here – if there are more than two applicants, both application forms must be signed by all applicants.**

Signature

Date

Signature

Date



**Mortgages are secured on your property.  
You could lose your property if you do not keep up payments on your mortgage.**

**The Mortgage Works (UK) plc** (Company No. 2222856) is a wholly owned subsidiary of Nationwide Building Society and is authorised and regulated by the Financial Conduct Authority (FCA) under registration number 189623. You can confirm our registration on the FCA's website [fca.org.uk](https://www.fca.org.uk)

**The Mortgage Works (UK) plc** also acts as agent and mortgage administrator for Derbyshire Home Loans Ltd (Company No. 2628265, FCA No. 302586) and for E-Mex Home Funding Ltd (Company No. 02124900, FCA No.305370). All three companies are wholly owned subsidiaries of Nationwide Building Society, are registered in England and Wales with their registered office at Nationwide House, Pipers Way, Swindon, SN38 1NW and are authorised and regulated by the FCA.

Most buy-to-let mortgages are not regulated by the FCA.

The Mortgage Works (UK) plc, Northampton Administration Centre, Kings Park Road, Moulton Park, Northampton, NN3 6NW

Telephone: **0345 606 40 60**