

Owner Occupied/ BTL Purchase/Re-Mortgage DIP Assessment Sheet - Page 1

Return this form by email to us at dip@bucksbs.co.uk

Company Name:	E-mail address:
Broker Name:	FCA No.:
Telephone Number:	Mortgage Club or Network:

HOW DID YOU HEAR ABOUT US? Please indicate with a letter 'X' in the boxes below

<input type="checkbox"/> Criteria Hub	<input type="checkbox"/> Knowledge Bank	<input type="checkbox"/> Help desk or Network	<input type="checkbox"/> Mortgage Brain
<input type="checkbox"/> Trigold	<input type="checkbox"/> Twenty7tec	<input type="checkbox"/> Julie Hanif	<input type="checkbox"/> Bucks BS website

Applicants Details	Applicant 1	Applicant 2
Full Names		
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Date of Birth		
Marital status		
Nationality		
Ages of dependants		
Mortgage term		
Age at end of term		
Retirement Age		

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Owner Occupied/BTL Purchase/Re-Mortgage DIP Assessment Sheet - Page 2

Mortgage Details

Mover/Re-mortgage/FTB		Sale price (Mover) £
Purchase Price	£	Est. value (re-mort) £
New mortgage required	£	Term
Existing mortgage balance (re-mort)	£	Source of deposit:
If re-mortgage, amount of additional borrowing and purpose	£ Purpose:	
Any other properties owned <i>YES/NO Please give details to include: Value, Outstanding Mortgage, Monthly Payment and Rental Income (if applicable)</i>		
Rep/Interest Only - Please state repayment vehicle if Interest Only		
Property Type		Number of beds
Freehold or Leasehold		Term of lease
If a flat, number of floors		Age of property
Standard Construction - YES/NO <i>If 'NO' state type of construction:</i>		

Employment Details	Applicant 1	Applicant 2
Employed, Self Employed, Retired, Contractor, Other <i>(please specify)</i>		
Occupation/Nature of business		
If Self Employed % shareholding		
Time in job/Self Employment		
Annual Income	Basic £	Basic £
Monthly Net Income	£	£
Overtime/bonus	O/T £	O/T £
	Bonus £	Bonus £
	Other Income £	Other Income £
Year:	S. Emp £	S. Emp £
Year:	S. Emp £	S. Emp £
Year:	S. Emp £	S. Emp £
Year:	S. Emp £	S. Emp £

Continue to next page...

Outstanding Credit

Monthly commitments - Type	Name - Applicant 1, 2 or joint	Balance outstanding (if applicable)	Monthly payment Being repaid Y/N
		£	£
		£	£
		£	£
		£	£
		£	£
		£	£

Summary		
Product Required:	Interest Rate:	Repayment Type:
Loan Amount: £	LTV:	Term

Any other relevant information

Any other relevant information including any known credit issues

Arranged by _____ Date: _____

Mortgage Adviser Declaration (when signing on behalf of the Client(s) or Enquirer)

I am aware that it is an offence to knowingly provide false, misleading or inaccurate information when applying for a loan on behalf of my client(s).

I confirm that I:
 have authority to submit this form on the client's behalf and issued them with my own privacy notice.
 I have made my clients aware that Buckinghamshire Building Society can make enquiries to third parties which includes credit reference agencies using the data I have provided.

I have informed my client that the Buckinghamshire Building Society Privacy Notice can be located on their website at the following address <https://www.bucksbs.co.uk/privacy-policy.html>. Alternatively this can be obtained directly from the Society by phoning 01494 879517 or emailing mortgages@bucksbs.co.uk

I confirm that I am duly authorised to act as Agent for all Enquirers (my clients) in connection with this application for a Decision in Principle.
 I confirm that I am acting within my authority as Agent, that I have obtained the verbal/written consent of each individual, and that I am appropriately authorised to sign the Enquirer Declaration on their behalf.

Signature of introducer: _____ Date: _____

If this is a joint application then in the event of death of one of the applicants, the mortgage must be affordable in the sole survivors own right.

The DIP lending decision is valid for 3 months however mortgage products can be withdrawn at anytime so cannot be guaranteed. If an application is not received the customer's information will be deleted after a period of 12 months and the soft search data will be deleted after 90 days.

To add additional applicants continue on pages 4, 5 & 6