

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

Return this form by email to us at [dip@bucksbs.co.uk](mailto: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		

Continue to next page...

# 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 £

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# Owner Occupied/BTL Purchase/Re-Mortgage DIP Assessment Sheet - Page 3

## 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

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

**Additional Applicants Application**

**Please complete this sheet for all additional applicants**

<b>Applicants Details</b>	<b>Applicant 3</b>	<b>Applicant 4</b>
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		

**Continue to next page...**

# Owner Occupied/BTL Purchase/Re-Mortgage DIP Assessment Sheet - Page 5

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>	<i>Details here</i>	
Rep/Interest Only - Please state repayment vehicle if Interest Only	State Repayment Vehicle	
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 3	Applicant 4
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 £

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**Outstanding Credit**

Monthly commitments - Type	Name - Applicant 3, 4 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(s))**

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](mailto: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:

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.

Date:

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.