

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

ADVISING INTERMEDIARY DETAILS

Name

Company Name

FCA Number

Advice Fee

Have you met the customer face to face? Yes No

MORTGAGE DETAILS

Property value/Purchase Price
(If RTB use the Open Market Value) £

Mortgage Amount £

Purchase/Remortgage Purchase Remortgage

Purpose of the Mortgage?

First Home

Home Mover

Second Home

Right To Buy

Purchase at Undervalue

Discounted Purchase Price
(If applicable) £

Estimated Monthly Rental
(BTL only) £

Is this an Ex Pat Application Yes No

BTL Occupation Type Single BTL unit HMO

Multi Freehold unit

How long has the customer
been a landlord? Years Months

REPAYMENT TYPE

Capital & Interest Interest Only Part & Part

PART & PART BREAKDOWN AMOUNTS

Capital and Interest £

Interest only £

Term Years Months

Fee added to loan if successful Yes No

IF REMORTGAGE-PURPOSE OF REMORTGAGE

Debt Consolidation

Extend Lease Term on a Property

Home Improvements

No Additional Borrowing

Payment of School Fees

Release of Equity

Other Legal Purpose

Existing Mortgage Balance £

Local Authority (If known)

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Vida Homeloans is a trading style of Belmont Green Finance Limited, registered in England and Wales no. 9837692. Registered office: 1 Bridge Street, Staines-upon-Thames, Surrey TW18 4TW. Belmont Green Finance Limited is authorised and regulated by the Financial Conduct Authority. Financial Services Register Firm Reference Number 738741.

CUSTOMER DETAILS - Applicant one

Customer Type Ltd Co. Partnership LLP
Individual SPV
Title Mr Mrs Miss Ms
First Name
Middle Name
Surname

How many other names have you been known by in the last 6 years? 0 1 2 3

Sex Male Female
Marital Status Single Married Divorced
Civil Partnership Widowed
Living with Partner Separated
Date of Birth
Nationality
Residency Status EEA Citizen
Permanent Rights to Reside
Working Permit

Does your customer have Diplomatic Immunity? Yes No
Is your customer a first time buyer? Yes No
Is your customer a first time landlord (BTL only)? Yes No
Has your customer ever had any criminal convictions? Yes No

If Yes - Further Details

Tax Status Non-taxpayer Basic rate taxpayer
Higher or Additional rate taxpayer

COMPLETE SECTION IF BTL IS IN COMPANY NAME

Company Name
Registered Number
Registered Address

SIC Code
Date Incorporated

ADDRESS HISTORY (A three year residential history is required)

CURRENT ADDRESS

House name / Number
Street
Town
Postcode
Residential status Owner
Living with Friends/Family
Tenant-Private Tenant-Local Authority
Date from

PREVIOUS ADDRESS

House name / Number
Street
Town
Postcode
Residential status Owner
Living with Friends/Family
Tenant-Private Tenant-Local Authority
Date from

NOTE: if further addresses are required to be captured please use additional notes page

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CUSTOMER DETAILS - Applicant two

Customer Type Ltd Co. Partnership LLP
Individual SPV
Title Mr Mrs Miss Ms
First Name
Middle Name
Surname

How many other names have you been known by in the last 6 years? 0 1 2 3

Sex Male Female
Marital Status Single Married Divorced
Civil Partnership Widowed
Living with Partner Separated

Date of Birth

Nationality

Residency Status EEA Citizen
Permanent Rights to Reside
Working Permit

Does your customer have Diplomatic Immunity? Yes No

Is your customer a first time buyer? Yes No

Is your customer a first time landlord (BTL only)? Yes No

Has your customer ever had any criminal convictions? Yes No

If Yes - Further Details

Tax Status Non-taxpayer Basic rate taxpayer
Higher or Additional rate taxpayer

ADDRESS HISTORY

(A three year residential history is required)

CURRENT ADDRESS

House name / Number
Street
Town
Postcode
Residential status Owner
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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 12 months employment history is required.

Employment Status

Employed Self-Employed Not Employed

Occupation Status

(Management, Supervisor, Unskilled etc.)

Sector

(Accountancy, Education, Recruitment etc.)

Type of Employment

Permanent Contract

Start Date

Type of Self Employment

LLP Partnership Ltd Co. Sole Trader

Start Date

Type of Not Employed

Unemployed Homemaker

Full Time Education Retired Full Time Carer

Number of Previous Employments in last 12 Months

0 1 2 3

Employment Status

Employed Self-Employed Not Employed

Occupation Status

(Management, Supervisor, Unskilled etc.)

Sector

(Accountancy, Education, Recruitment etc.)

Type of Employment

Permanent Contract

Start Date

Type of Self Employment

LLP Partnership Ltd Co. Sole Trader

Start Date

Type of Not Employed

Unemployed Homemaker

Full Time Education Retired Full Time Carer

Number of Previous Employments in last 12 Months

0 1 2 3

NOTE: if the customers have previous employment in last 12 months please provide further details on the additional notes page.

SECOND JOB DETAILS

Please only include a second job if your customer has at least 12 months history within this sector.

Employed Permanent Contract N/A

Self Employed Ltd Co. Partnership LLP

Sole Trader N/A

Start Date

Occupation Status

Sector

Employed Permanent Contract N/A

Self Employed Ltd Co. Partnership LLP

Sole Trader N/A

Start Date

Occupation Status

Sector

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INCOME DETAILS - Applicant one

Self Employed Annual Net Profit
(after Salary and Dividends)

£	<input type="text"/>	for year end	<input type="text"/>
£	<input type="text"/>	for year end	<input type="text"/>
£	<input type="text"/>	for year end	<input type="text"/>

GROSS ANNUAL INCOME

Salary	£	<input type="text"/>
Commission	£	<input type="text"/>
Regular Bonus	£	<input type="text"/>
Non-Regular Bonus	£	<input type="text"/>
Overtime	£	<input type="text"/>
Pension	£	<input type="text"/>
Allowances	£	<input type="text"/>
Maintenance	£	<input type="text"/>
Dividends	£	<input type="text"/>
Investment Income/Rental Profit	£	<input type="text"/>
Second Job Income	£	<input type="text"/>
Benefits	£	<input type="text"/>
Total	£	<input type="text"/>

Can at least one years accounts
or SA302 be provided Yes No

Expected Retirement Age Years

INCOME DETAILS - Applicant two

Self Employed Annual Net Profit
(after Salary and Dividends)

£	<input type="text"/>	for year end	<input type="text"/>
£	<input type="text"/>	for year end	<input type="text"/>
£	<input type="text"/>	for year end	<input type="text"/>

GROSS ANNUAL INCOME

Salary	£	<input type="text"/>
Commission	£	<input type="text"/>
Regular Bonus	£	<input type="text"/>
Non-Regular Bonus	£	<input type="text"/>
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Second Job Income	£	<input type="text"/>
Benefits	£	<input type="text"/>
Total	£	<input type="text"/>

Can at least one years accounts
or SA302 be provided Yes No

Expected Retirement Age Years

Complete Retirement Income Section below where Loan Term Extends beyond disclosed retirement Age

State Pension Income	£	<input type="text"/>
Other Pension Income	£	<input type="text"/>
Investment Income	£	<input type="text"/>
Rental Profit from Unencumbered Property	£	<input type="text"/>
Rental Profit from Mortgaged Property	£	<input type="text"/>

State Pension Income	£	<input type="text"/>
Other Pension Income	£	<input type="text"/>
Investment Income	£	<input type="text"/>
Rental Profit from Unencumbered Property	£	<input type="text"/>
Rental Profit from Mortgaged Property	£	<input type="text"/>

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EXPENDITURE DETAILS - Applicant one

Number of Financial Dependants Under 18

Number of Financial Dependants Over 18

Ground rent and Service charges £

Personal Goods £

Council Tax £

Utility/Telephone Bills £

Clothing £

Insurances £

Maintenance/CCJ/Default or Debt Management Repayments £

Childcare/School/ University Fees £

Student Loans £

Household Goods £

Housekeeping (Food & Washing) £

Entertainment £

Travel £

Interest Only Repayment Strategies £

Monthly Savings Payments £

EXPENDITURE DETAILS - Applicant two

Number of Financial Dependants Under 18

Number of Financial Dependants Over 18

Ground rent and Service charges £

Personal Goods £

Council Tax £

Utility/Telephone Bills £

Clothing £

Insurances £

Maintenance/CCJ/Default or Debt Management Repayments £

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