Introducer Details

Name	
Company & Network	
FCA Number	
Telephone	
Email	
Broker Fee	
Advised Or Non Advised	Select Case Type
Estimated Completion Date	

Rationale

Introduction to case:	

Loan Details

	Loan 1			Loan 2 (if applicable)		
Loan Type	Select Loan Type			Select Loan Type		
Term		Years	0	Months	Years		Months
Deposit & Source of Deposit						
Loan Amount						
Property Value						
Loan To Value %	#DIV/0!			#DIV/0!		
Anticipated Monthly Rental Income						
Repayment Type	Select Repayment Type			Select Repayment Type		
Repayment Strategy if Interest Only						
Address of Property to be Mortgaged						
Property Type						
Number of Bedrooms						
Standard Construction?	Select Option			Select Option		
Address of Secondary Property to be Secured Against						
Secondary Property Value						
Is Secondary property a Standard Construction?	Select Option			Select Option		
Monthly Rental (if let)						
Secondary Security Property Type						

Applicant Details	Applicant 1	Applicant 2	Applicant 3 (if applicable)	Applicant 4 (if applicable)
Title	Select Title	Select Title	Select Title	Select Title
First Name				
Middle Name				
Surname				
Date Of Birth				
Current Address				
If less than 3 years, please state previous address				

Broker Line: 01858 412670
Business Development Manager: 07885 933595
Email:brokers@mhbs.co.uk
Website: www.mhbspartners.co.uk

Applicant Details (cont)	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Expatriate Mortgage?	Select Option	Select Option	Select Option	Select Option
Is Life Cover in place?	Select Option	Select Option	Select Option	Select Option
Nationality				
Marital Status	Select Marital Status	Select Marital Status	Select Marital Status	Select Marital Status
Has The Applicant had any CCJs or Defaults in the Last 3 years?	Select Option	Select Option	Select Option	Select Option

Employment Details	Applicant 1		Applicant 2		Applicant 3		Applicant 4	
Employment Status	Select Employment Status		Select Employment Status		Select Employment Status		Select Employment Status	
Employer								
Employment Type	Select Option		Select Option		Select Option		Select Option	
Occupation								
Length Of Service								
Is there a Probationary Period?	Select Option		Select Option		Select Option		Select Option	
Basic Annual Salary (inc dividends) if self employed		Select Currency		Select Currency		Select Currency		Select Currency
Average Annual overtime		Select Currency		Select Currency		Select Currency		Select Currency
Average Annual Bonus		Select Currency		Select Currency		Select Currency		Select Currency
Average Annual Allowances		Select Currency		Select Currency		Select Currency		Select Currency
Annual Rent a room / Consent to let		Select Currency		Select Currency		Select Currency		Select Currency
Annual Investment Income		Select Currency		Select Currency		Select Currency		Select Currency
Annual Child Benefit		Select Currency		Select Currency		Select Currency		Select Currency
Annual Other State Benefits		Select Currency		Select Currency		Select Currency		Select Currency
Annual Current State Pension Income		Select Currency		Select Currency		Select Currency		Select Currency
Current Annual Personal Pension Income		Select Currency		Select Currency		Select Currency		Select Currency
Total	0		0		0		0	
NET MONTHLY PAY (As per payslip)		Select Currency		Select Currency		Select Currency		Select Currency

Additional Assets & Liabilities Post Completion

Value of Home (if not part of this loan application)			Mortgage on Home		Pay Rate	
					Payment	
Value of Property 1		Rent PCM	Mortgage on Property 1		Pay Rate	
					Payment	
Value of Property 2		Rent PCM	Mortgage on Property 2		Pay Rate	
					Payment	
Value of Property 3		Rent PCM	Mortgage on Property 3		Pay Rate	
					Payment	
Cash Deposits			Total Outstanding Credit Card			
Other Investments			Other debts (Loans, car finance etc)			
Total	£0		Total	£0		

Additional Information

Declaration

I understand that the information provided will assist you (the lender) in making a decision as to whether you the lender can consider my client(s) further for a mortgage application.

Select Option

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I confirm that the information provided on this form is to the best of my knowledge and that I have the consent of the applicants to provide this information to you (the lender).		Select Option
Date:	Broker Name :	

Monthly Budget Planner

	Define Household		Define Household		Define Household		Define Household	
Adults in Household								
Children in Household								
Rent		Select Currency		Select Currency		Select Currency		Select Currency
Other Loan Commitments		Select Currency		Select Currency		Select Currency		Select Currency
Maintenance Payments		Select Currency		Select Currency		Select Currency		Select Currency
Grocery Costs		Select Currency		Select Currency		Select Currency		Select Currency
Household Energy Cost		Select Currency		Select Currency		Select Currency		Select Currency
Water		Select Currency		Select Currency		Select Currency		Select Currency
Telephone		Select Currency		Select Currency		Select Currency		Select Currency
Television License / Subscriptions		Select Currency		Select Currency		Select Currency		Select Currency
Household Goods		Select Currency		Select Currency		Select Currency		Select Currency
Council Tax		Select Currency		Select Currency		Select Currency		Select Currency
Ground Rent / Service Charge		Select Currency		Select Currency		Select Currency		Select Currency
Buildings / Buildings and Contents Insurance		Select Currency		Select Currency		Select Currency		Select Currency
School Fees / Child Care Costs		Select Currency		Select Currency		Select Currency		Select Currency
Car Costs		Select Currency		Select Currency		Select Currency		Select Currency
Travel Costs		Select Currency		Select Currency		Select Currency		Select Currency
Clothing		Select Currency		Select Currency		Select Currency		Select Currency
Personal Goods		Select Currency		Select Currency		Select Currency		Select Currency
Private Pension Contributions		Select Currency		Select Currency		Select Currency		Select Currency
Insurance Premiums		Select Currency		Select Currency		Select Currency		Select Currency
Repayment Strategy On Interest Only		Select Currency		Select Currency		Select Currency		Select Currency
Holiday / Entertainment		Select Currency		Select Currency		Select Currency		Select Currency
Pet Costs		Select Currency		Select Currency		Select Currency		Select Currency
Credit Card Payments		Select Currency		Select Currency		Select Currency		Select Currency
Other Expenditure		Select Currency		Select Currency		Select Currency		Select Currency
TOTAL		Select Currency		Select Currency		Select Currency	-	

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