

Enquiry Form (For Regulated Mortgages)

Individual applicants

octopusproperty

Introducer Details

Contact name _____ Date _____
Company name _____ Network/Mortgage Club _____
Telephone _____ Mobile _____
Email _____ FCA Registration Number _____
Broker fee _____ Payable upfront Added to loan Deducted from net loan advance
Are you packaging the application on behalf of an authorised intermediary? Yes No
If 'yes', Firm name _____ FCA Registration Number _____
Firm address _____ Postcode _____
Telephone _____
Which firm will be providing advice to the client? (must be an authorised intermediary) _____
Is the broker fee split with the authorised intermediary? Yes No If 'yes', please advise how _____
Is the proc fee split with the authorised intermediary? Yes No If 'yes', please advise how _____

A. Applicant Details (if more than two applicants, please enter the information clearly in Section E, or if more room is needed on an additional sheet)

Applicant 1

Title _____ Full name _____
Address _____
_____ Postcode _____
Date of birth _____ Marital status _____
Nationality _____ Country of residence _____
Has the Applicant had any adverse credit registered in the last 3 years? Yes No
If the Applicant owns his/her house what is the value? £ _____
Amount of mortgage outstanding, if any? £ _____
Name of lender(s) _____
Annual income? £ _____

Applicant 2 (or Guarantor)

Title _____ Full name _____
Address _____
_____ Postcode _____
Date of birth _____ Marital status _____
Nationality _____ Country of residence _____
Has the Applicant had any adverse credit registered in the last 3 years? Yes No
If the Applicant owns his/her house what is the value? £ _____
Amount of mortgage outstanding, if any? £ _____
Name of lender(s) _____
Annual income? £ _____

B. Loan Details

What product are you applying for? _____
What are the funds going to be used for? (explanation required) _____

If refinance, what were the original funds used for? _____

If Second Charge, is more than 60% for business purposes? Yes No
What is the net amount required? £ _____ Term of the Loan? _____
How will the Loan be repaid? (explanation required) _____

Is the Borrower resident abroad or is there an intention to use foreign earnings or assets to repay the loan? Yes No

C. Property being used as security for the Loan (if more than one property, please enter the information clearly on an additional sheet)

Full address _____
_____ Postcode _____

Is the property Freehold or Leasehold? If Leasehold, how many years remain on the lease? _____ years

Is the Applicant offering Octopus Property a First Charge or Second Charge on this property?

Type of property (full description) _____

If Semi Commercial is more than 60% used for commercial purposes? Yes No

If 'no', is the balance used as Buy to Let Yes No If so, who occupies? _____

What is the condition of the property? (please describe) _____

Already owned – date purchased _____ Being purchased Owned by another

Purchased price/price paid? £ _____ Estimated value of the property? £ _____

What is the outstanding mortgage(s) on the property (if already owned)? £ _____ Name of lender(s) _____

If the property is tenanted, what is the monthly rental income? £ _____ per month

Does the Applicant(s) own any other properties? Yes No

Does the Borrower have any other BTL property at the present time? Yes No

Who will live/lives in the property? _____ What is their relationship to the Applicant(s)? _____

Has the Borrower or related person ever occupied the property? Yes No

Does the Borrower or related person intend to occupy the property at any time in the future? Yes No If so what % will they occupy? _____ %

D. Preferred Payment Options

Interest

Option 1 (Consumer Buy to Let loans only) Payments made by Standing Order monthly in arrears (loan serviced monthly).

Option 2 The Applicant(s) would prefer to have interest added to the Loan monthly.

Fees

Completion Fee: Payable upfront Added to loan Deducted from net loan advance

Legal Fees: Payable upfront Added to loan Deducted from net loan advance

E. Additional information to support the application

Please tick if you have attached Additional Information sheets to this form.

Thank you for submitting this enquiry. We will consider the information and endeavour to provide you with an Agreement in Principle or contact you to discuss the case as soon as possible after receipt.