INDIRECT MORTGAGE APPLICATION FORM

A: APPLICANTS	First Applicant	Second Applicant
Title (Mr/Mrs/Dr etc)		
Surname		
Forename(s)		
Previous Surnames		
(Date of Change)		
Date of Birth		
National Insurance No		
Nationality		
Expected Retirement Age		
Telephone (Home)		
Telephone (Mobile)		
Email Address		
Dependent Children		
Names & Dates of Birth of Children		
Present Address		
Residential Status		
Time at this address	*Years* *Months*	*Years* *Months*
Previous Address (5 year history required)		
Time at this address	*Years* *Months*	*Years* *Months*

Stafford Building Society, 4 Market Square, Stafford ST16 2JH.

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B: INCOME AND EMPLOYMENT

Employed	First Applicant	Second Applicant
Name & Address of Employer		
Job Title		
Length of Service (3 year history needed)	Years Months	Years Months
Telephone Number		
Email Address		
Permanent position?	YES ☐ NO ☐	YES ☐ NO ☐
If 'NO', contract type length		
Name & Address of Previous Employer		
Job Title		
Length of Service (3 year history needed)	Years Months	Years Months

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Income and Employment

Gross Income Figures

	First Applicant	**Second Applicant**
Basic Annual Income	£ _____ per annum	£ _____ per annum
Regular Overtime	£ _____ per annum	£ _____ per annum
Regular Bonus	£ _____ per annum	£ _____ per annum
Regular Commission	£ _____ per annum	£ _____ per annum
Private Pension	£ _____ per annum	£ _____ per annum
State Pension	£ _____ per annum	£ _____ per annum
Rental Income	£ _____ per annum	£ _____ per annum
Car Allowance	£ _____ per annum	£ _____ per annum
Shift Allowance	£ _____ per annum	£ _____ per annum
Housing Allowance	£ _____ per annum	£ _____ per annum
Maintenance (By Court Order)	£ _____ per annum	£ _____ per annum

Second Job

(Please Provide Name, Address, Telephone Number, Email Address & Income)

INDIRECT MORTGAGE APPLICATION FORM

Self-Employed

	First Applicant	**Second Applicant**
Business Name		
Address		

	First Applicant	**Second Applicant**
Limited Company	YES ☐ NO ☐	YES ☐ NO ☐
Sole Trader	YES ☐ NO ☐	YES ☐ NO ☐
Share of Profit		
Partnership	YES ☐ NO ☐	YES ☐ NO ☐
Share of Profit		
Start Date of Trade		

	First Applicant	**Second Applicant**
Accountants Name		
Address		
Telephone Number		
Email Address		

INDIRECT MORTGAGE APPLICATION FORM

Self-Employed Income

	First Applicant	**Second Applicant**
Sole Trader/Partnership	£ _____ Year to	£ _____ Year to
Net Profit	£ _____ Year to	£ _____ Year to

Directors

	First Applicant	**Second Applicant**
Salary	£ _____ Year to	£ _____ Year to
	£ _____ Year to	£ _____ Year to
	£ _____ Year to	£ _____ Year to
Dividends	£ _____ Year to	£ _____ Year to
	£ _____ Year to	£ _____ Year to
	£ _____ Year to	£ _____ Year to

C: MORTGAGE REQUIRED

Product Required [_____]

Details of Mortgage Required

Total Amount Required £ [_____]

Term of Loan Years [_____]

Type of Mortgage

Amount required on repayment basis £ [_____]

Amount required on interest only basis £ [_____]

Purpose of Mortgage

☐ House Purchase ☐ Remortgage ☐ Capital Raising ☐ Home Improvements ☐ Debt Consolidation

If Capital Raising please state purpose [_____]

INDIRECT MORTGAGE APPLICATION FORM

Interest Only Repayment Strategy

Sale of Property
Maturity of Investment
(specify amount)

Pensions Lump Sum

Other (please specify) (eg - living with relatives, renting)

If Sale of Property how much equity is available (min £300K)

Down Sizing Property Details e.g location, type of property, price, etc..

D: SOLICITOR

Solicitor Acting

Name of Firm

Address

Telephone Number

Email Address

INDIRECT MORTGAGE APPLICATION FORM

E: DETAILS OF PROPERTY TO BE MORTGAGED

Address of Property	
Name & Address of Vendor/Agent Selling	
Contact Number	

Homebuyers Report Required   YES ☐   NO ☐

Building/Structural Survey Required   YES ☐   NO ☐

Purchase Price/Current Valuation   £

Date of Construction

Is this a Right to Buy Application   YES ☐   NO ☐

INDIRECT MORTGAGE APPLICATION FORM

E: DETAILS OF PROPERTY TO BE MORTGAGED

Please tick which apply:-

House	☐	Detached	☐	Over 55's accommodation	☐
Flat	☐	Semi-Detached	☐	Over commercial property	☐
Maisonette	☐	Terrace (End/Mid)	☐	If yes, what type of business	
Bungalow	☐	Freehold	☐		
Floors (Flat Only)	☐	Leasehold	☐		

If Leasehold, at the end of the mortgage term there must be at least 75 years unexpired left on the lease.

Please complete all that apply:-

Unexpired Term of Lease	
Maintenance Charge/Ground Rent	
No of Living Rooms	
No of Bedrooms	
No of Kitchens	
No of Bathrooms	
No of Toilets	
No of Garages	

If purchasing a flat there is a minimum property value of £250,000 where there are more than 4 floors in the building

If the property is less than 15 years old, is there a NHBC certificate, or certificate from a registered architect?

YES ☐   NO ☐

If the property has been subject of a Right to Buy or Rent to Mortgage agreement within the last three years, please give details

F: OUTGOINGS OF APPLICANTS

Please list below details of all existing residential and Buy to Let mortgages, Loans, hire purchases, credit cards (including 0% transfers), maintenance payments or other existing outgoings.

Name of Lender/Creditor	Type of Outgoing	Total Owing £	Monthly Payment	In the name of	To be repaid at completion	
					YES	*NO*

INDIRECT MORTGAGE APPLICATION FORM

H: BUILDINGS INSURANCE

The Society's valuer will provide an Insurance valuation which is, in his opinion, the sum required to rebuild the property in the event of total destruction. The property must initially be insured for this amount. Full instructions regarding the Society's requirements for buildings insurance will accompany your offer.

I: OCCUPIERS

Please list the full names and date of births of all those (excluding the applicants) over the age of 17 who live/will live in the property described in Section F. If the property is/is to be tenanted it is sufficient to state 'Tenanted by single family unit' or 'Tenanted-multi occupancy' (e.g students/separate bed sits)

Name	Date of Birth