

Fax to 01902 504094 or email [caseowner@promisesolutions.co.uk](mailto:caseowner@promisesolutions.co.uk)

YOU MUST ENTER YOUR BROKER CODE. PLEASE CALL 01902 585052 IF YOU DON'T HAVE ONE

(1) Broker Code: <input type="text"/>	Broker Name: <input type="text"/>
Case Ref: <input type="text"/> (office use only)	Tel. <input type="text"/> Email: <input type="text"/>

(2) Personal Details	1st Named Applicant	2nd Named Applicant
Title		
Forename		
Middle name		
Surname		
Maiden name		
Marital status		
Date of birth		
Are you on Deeds and/or Mortgage		
Others living in property over 18		
Home telephone number		
Work telephone number		
Mobile telephone number		
Email address		
Correspondence address		
Date moved in to above address		
Previous Address History (3 years address history needed)		
Previous address (up to 3 yrs history)		
Date moved in		
Previous address (up to 3 yrs history)		
Date moved in		

(3) Employment & Income	1st Named Applicant		2nd Named Applicant	
	Gross	Net	Gross	Net
Income				
Occupation				
Start date				
Shareholding				
If S/E – Proof of income				
Additional Income type				
Amount per month				
Additional Income type				
Amount per month				
Previous Employment details (3 years employment history needed)				
Previous employment occupation				
Prev. employment Start/End date		To		To

(4) Charges on Property	Mortgage Account	Second Mortgage Account
Lender		
Current balance		
Redemption balance (if known)		
Repayment per month		
Date of most recent advance		
Mort type (Var, fixed, tracker, Interest Only)		
Missed mortgage payments in last 12 mths		
Balance of current mortgage arrears		
Interest rate of current mortgage		

(5) Security address			
Freehold		Standard construction	Date purchased
Leasehold		Non Standard construction	Purchase price
Detached		Double glazing	Estimated value
Semi detached		Number of Bedrooms	Lease yrs remaining
Bungalow		Central heating	Which floor flat
Flat		In a block	Number of floors in the block
Terraced		Garage	Above a shop
Maisonette		Shared ownership	Similar type house for sale close by
Ex council		Unusual features adding value	Estate agent selling it
Buy to let		Tenants in place	Number of over 17's living in the house (excluding applicants)

### (7) Broker Confirmation – please sign below

**Consent to credit search and DPA** - I confirm my client has consented to proceed in accordance with the following statement.

All parties to the application authorise Promise Solutions, its subsidiaries and its finance providers to credit score your application. To do this Promise may need to verify your details with credit reference and fraud prevention agencies. The checks completed are recorded by agencies and if you provide inaccurate information, they may also record this. Other companies that you or your financial associates go to for credit, insurance or other products may see the records stored. All parties also authorise Promise to retain the details provided and discuss all future matters relating to the application with other parties to the loan.

By submitting this enquiry I confirm I have read and agree to the latest version of our introducer agreement which is available at [http://www.promisesolutions.co.uk/Documents/terms\\_and\\_conditions.pdf](http://www.promisesolutions.co.uk/Documents/terms_and_conditions.pdf)

Should I ultimately select Promise's packaging service I acknowledge I will be wholly responsible for the advice and suitability of the loan offered in accordance with all FCA rules and guidance. Promise will only act as a packager.

Broker signature

### (8) Service options

#### Choose the service you require

- Referral – You want us to contact your client immediately and advise them on the most suitable loan**  
(Promise will be responsible for sale of the loan and keep you updated)
- Research – You want us to research available loans so you can decide if it may be suitable**  
(Promise will discuss the options available with you and whether to refer to Promise or sell the loan yourself)
- Club – You intend to fully package the case yourself with a lender through our club arrangement and want us to advise you on comparable rates and which lenders are likely to accept the case.**

#### What is the reason for this potential referral? (choose one)

- I have no mortgage or other options available
- I am exploring loan options to compare with a remortgage

#### State why a remortgage may not be suitable / available

#### Based on your fact find, indicate loan requirements

Loan amount

Term

Capital / repayment  or interest only

Variable  Tracker  Fixed  (Indicate fixed/tracker term )

Overpayment with low penalties

Low ERC's

## Income & Expenditure form (to be used for our lenders purpose only)

Name \_\_\_\_\_ Address \_\_\_\_\_

<b>Income</b>	
All figures should be monthly	
Net wages / salary	£
Private pension	£
State pension	£
Child Benefit	£
Working family tax credit	£
Child tax credit	£
Income support	£
Incapacity benefit	£
Disability living allowance	£
Maintenance / child support	£
Rental Income - other properties	£
Other 1	£
Other 2	£
Other 3	£
Other 4	£
Other 5	£
<b>Total income</b>	<b>£</b>

Please detail below any dependents living in the property under the age of 16	
Full name	date of birth
Please detail below anyone living in the property <b>over</b> the age of 16	

<b>Expenditure</b>	
All figures should be monthly	
1st Mortgage payment	£
Proposed Loan repayment	£
Ground rent / service charge	£
Pension & life insurance	£
Buildings & contents	£
Council tax	£
Gas	£
Electric	£
Other heating fuels	£
Water	£
Shopping (food, drink, smoking, alcohol etc)	£
Prescriptions/Healthcare	£
TV licence / sky / cable	£
Telephone & internet	£
Mobile phone (inc pay as you go)	£
Entertainment (going out, socialising etc)	£
Clothing / Hair	£
Child related expenses (fee's, clubs)	£
Pets (food, vet bills, pet insurance)	£
Other regular expenses not covered above	£
<b>Travel Expenses</b>	
How many cars do you own?	
Car Expenses (petrol, insurance, tax)	£
Other travel expenses (bus/train)	£
<b>Existing credit items not to be repaid (i.e. cc, loans etc)</b>	
	£
<b>Total Expenditure</b>	
	£
<b>Total income</b>	£
Minus total expenditure	£
<b>Surplus</b>	£

It is important to complete the items above as accurately as possible taking into consideration all of your average monthly expenditure. I/we confirm that the above information is a true reflection of our expenditure. I/we are not aware of any impending changes to my/our circumstances of income. If I/we become aware of any changes to our income prior to the loan completing, I/we will notify Promise Solutions.

Signed \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON A MORTGAGE  
OR ANY OTHER DEBT SECURED ON IT  
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