

Intermediary Details

Broker code

Broker Name

FCA Number

Mobile Number

Office Number

Email

Personal Details

Applicant 1

Title

Forename

Middle name

Surname

Maiden name

Date of birth

Marital status

Home Telephone Number

Mobile Telephone Number (Required to send access code for customer portal - when applicable)

Work Telephone Number

Email (Required to send Privacy Policy)

Correspondence address

Date moved in to above address

Previous address (up to 3 yrs history)

Date moved in

Previous address (up to 3 yrs history)

Date moved in

Are you on deeds and/or mortgage? Yes No

Others living in property over 18 How many

Applicant 2

Title

Forename

Middle name

Surname

Maiden name

Date of birth

Marital status

Home Telephone Number

Mobile Telephone Number

Work Telephone Number

Email

Correspondence address

Date moved in to above address

Previous address (up to 3 yrs history)

Date moved in

Previous address (up to 3 yrs history)

Date moved in

Are you on deeds and/or mortgage? Yes No

Others living in property under 18 How many

Loan requirements

Loan amount Term Capital/Repayment Interest only

Variable Tracker Fixed (indicate fixed/tracker term) Overpayments with low penalties Low ERC's

Loan Purpose

Security address Information

Security address Date purchased

Purchase price Estimated value

Ex council Buy to let Shared Ownership Tenants in place

Standard construction Non-standard construction

Property type

Detached Semi-Detached Bungalow Above a shop

Flat Terraced Maisonette

If a flat

In a block Number of floors in block Which floor flat

Freehold / Leasehold

Freehold Leasehold Lease yrs remaining

Property features

Double Glazing Central heating Unusual features adding value Garage

Number of bedrooms

Additional Information

Similar type of house for sale close by Estate agent selling it Number of over 17's living in the house (excluding applicants)

Employment and Income

Applicant 1

Occupation

Start date

Annual income Gross Net

If S/E - proof of income

Shareholding

Additional income type

Amount per month

Additional income type

Amount per month

Applicant 2

Occupation

Start date

Annual income Gross Net

If S/E - proof of income

Shareholding

Additional income type

Amount per month

Additional income type

Amount per month

3 Year Job History

Job Title	Start Date	<input type="text"/>	End Date	<input type="text"/>
Job Title	<input type="text"/>	Start Date	<input type="text"/>	End Date
Job Title	<input type="text"/>	Start Date	<input type="text"/>	End Date

3 Year Job History

Job Title	<input type="text"/>	Start Date	<input type="text"/>	End Date	<input type="text"/>
Job Title	<input type="text"/>	Start Date	<input type="text"/>	End Date	<input type="text"/>
Job Title	<input type="text"/>	Start Date	<input type="text"/>	End Date	<input type="text"/>

Charges on property

Mortgage account

Lender

Current Balance

Redemption balance (if known)

Repayment per month

Interest rate of current mortgage

Mortgage type

Date of most recent advance

Missed mortgage payments in last 12 months

Balance of current mortgages arrears

Second mortgage account

Lender

Current Balance

Redemption balance (if known)

Repayment per month

Interest rate of current mortgage

Mortgage type

Date of most recent advance

Missed mortgage payments in last 12 months

Balance of current mortgages arrears

When complete, Fax to 01902 504094 or email sales@promisesolutions.co.uk

You must provide your broker code: Please call 01902 585052 if you don't have one

Address: Second Floor, Fullard House, Neachells Lane, WV11 3QG

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

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. 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:

When complete, Fax to 01902 504094 or email sales@promisesolutions.co.uk

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

Name _____ Address _____

Income	
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	£
Total income	£

Expenditure	
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	£
Travel Expenses	
How many cars do you own?	
Car Expenses (petrol, insurance, tax)	£
Other travel expenses (bus/train)	£
Existing credit items not to be repaid (i.e. cc, loans etc)	£

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 over the age of 16	

Total Expenditure	£
Total income	£
Minus total expenditure	£
Surplus	£

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
Promise Solutions Limited authorised & regulated by the Financial Conduct Authority number 610473

IE 4/12 v 1.0