



This form can be completed electronically, saved and printed.  
If completing manually, please complete in black ink and BLOCK CAPITALS. Complete all boxes which apply.

Intermediary Name: <input style="width: 95%;" type="text"/>	Email address: <input style="width: 95%;" type="text"/>
Telephone number: <input style="width: 95%;" type="text"/>	FCA Number: <input style="width: 95%;" type="text"/>

**ARRANGEMENT/ADVICE FEES**

Fee description	Payable to	Amount	Payable on	Refundable
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

Amount of procurator fee to be refunded to client (if any):    £

**SOLICITOR CONVEYANCER**

I confirm that I have discussed with my client(s) section 7 of the mortgage application form, explaining the two options available for appointing a solicitor / conveyancer and the potential legal costs for both. Yes    No

**DECLARATION**

- I have verified the customer(s) identity and will retain suitable records of the evidence seen to satisfy identity verification requirements under the Money Laundering Regulations 2007 and the Financial Services and Markets Act 2000. I will make these records available, on request, to Chorley & District Building Society or the Financial Conduct Authority.
- I have advised the customer on the types of valuations and surveys available, the other costs payable and credit searches.
- The registration number for the Financial Conduct Authority (FCA) completed above is correct;
- have complied with the FCA rules in giving advice to the customer(s);
- I have provided the applicant(s) with an accurate ESIS prior to application;
- I am duly authorised to submit this application and am not doing so on behalf of an unauthorised person or firm.

Intermediary signature:		Date:	
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**1. Applicant Details**

If you proceed with a mortgage with the Society after receiving an illustration, the first applicant will be the person named first in the Society's records in respect of the mortgage. Only the first names will be entitled to voting rights in respect of the mortgage subject to being a borrowing member.

	1st Applicant	2nd Applicant
Existing Account Numbers (if applicable)	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Customer ID Number (if applicable)	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Enquiry type	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Title	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Surname	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
First Name(s)	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
NI Number	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Marital Status	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Home telephone number	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Work telephone number	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Mobile telephone number	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Email address	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

I am happy to receive communication via email from the Society and understand it is not a completely secure method of communication

Yes  No

Has the loan amount changed since the Decision in Principle  Yes  No If yes, what is the new loan amount?

I/We confirm there have been no other changes to the information provided in the Request for a Decision in Principle

Yes  No

Do you currently, or have you ever held a senior position of public trust in the UK or elsewhere (i.e. as a politician, councillor, or judge whether full or part time, paid or unpaid) or are/were you closely connected to anyone that does or did hold one of these positions?

Yes  No

If yes, please enter full details in the additional comments section.

## 2. Employed Applicant Details

### 1st Applicant

### 2nd Applicant

Current employer name



Current employer business/sector type



Current employer address

  
  

  
  


Postcode

Postcode

Current employer telephone number



Current employer fax number



Time with your current employer

From Month  Year

From Month  Year

How long have you been in your current role

Years  Months

Years  Months

Previous employer name



Previous employer address

  
  

  
  


Postcode

Postcode

Previous employer telephone number



Previous employer fax number



Time with your previous employer

From    
To

From    
To

Are you aware of any impending changes to your employment conditions:

Yes  No

Yes  No

If yes, provide details in the additional comments section.

Are you in a probationary period:

Yes  No

Yes  No

If yes, provide details in the additional comments section.

Is your current employment permanent:

Yes  No

Yes  No

If no, provide details in the additional comments section.

Is this a family business?

Yes  No

Yes  No

If yes, provide company accountant details in section 3.

Do you hold shares in this or any other company:

Yes  No

Yes  No

If yes, provide details in the additional comments section with % shareholding.

### 3. Self-Employed Applicant Details

	1st Applicant	2nd Applicant
Company Trading Address	<input type="text"/>	<input type="text"/>
	Postcode <input type="text"/>	Postcode <input type="text"/>
Company telephone number	<input type="text"/>	<input type="text"/>
Company fax number	<input type="text"/>	<input type="text"/>
Name of your accountant	<input type="text"/>	<input type="text"/>
Accountants address	<input type="text"/>	<input type="text"/>
	Postcode <input type="text"/>	Postcode <input type="text"/>
Accountants telephone number	<input type="text"/>	<input type="text"/>
Accountants fax number	<input type="text"/>	<input type="text"/>
Accountants qualification	<input type="text"/>	<input type="text"/>

### 4. To be completed for all types of mortgages

Will there be any people aged over 17, who will live in the property?  
(If yes, please supply their names, dates of birth and relationship to you, in the additional comments section)

Yes       No

Will any of the property be used for purposes other than your own residence?

Yes       No

If yes, will your residential use exceed 40% of the overall area of the property?  
Please supply further details in the additional comments section, detailing the purpose for which the property will be used.

Yes       No       N/A

Are you aware of any planning restriction(s)?

Yes       No

Is vacant possession of the property being obtained on completion of the purchase and/or mortgage?

Yes       No       N/A

Do you intend to occupy the property immediately on completion?  
If no, please supply further details in the additional comments section.

Yes       No       N/A

Will you be providing all the monies required in addition to this loan to enable you to purchase the property and fund the project?

Yes       No       N/A

Will any additional borrowing be secured against the property by a second charge?

Yes       No

Will the mortgage be for the direct financial benefit and advantage of all applicants?  
If no, please supply further details in the additional comments section.

Yes       No

Do you expect to complete the project within 3 years of release of the mortgage?

Yes       No

## 5. Insurances

In view of the financial commitment your new mortgage represents, we recommend you undertake a review of your insurance provisions to ensure you have adequate life assurance, critical illness cover and health insurance. We suggest you visit [www.themoneyadvice.service.org.uk](http://www.themoneyadvice.service.org.uk) to get further information.

You should also ensure you have adequate protection for your buildings and contents insurance.

## 6. Solicitor / Conveyancer details

The Society operates an open solicitors' panel in collaboration with its legal services partner, Legal Marketing Services Ltd (LMS).

There are two conveyancing options:

Option 1) The Society can appoint a solicitor on your behalf using LMS, to handle your conveyancing and act for the Society. If you select this option, we will arrange a quote for you.

Option 2) You can appoint your own solicitor to handle your conveyancing and act for the Society. To meet our panel requirements your solicitor must be registered with the Law Society or Council of Licensed Conveyancers, have a minimum of 4 partners and have professional indemnity insurance in place to the value of £2,000,000.

Please tick the box if you wish the Society to instruct a solicitor on your behalf (Option 1)

Please tick the box if you do not wish the Society to instruct a solicitor on your behalf (Option 2)

**If you wish to use your own Solicitor/Conveyancer, then please complete the following information.**

Name of Solicitor Firm

Address

Postcode

Name of person acting

Telephone Number

Email Address:

## 7. Valuation report

The Society will instruct an external surveyor to prepare a valuation report on the property to be mortgaged. The scope of the report is limited; it is not a Homebuyers Report or a Building Survey. The valuation report is prepared for the Society's purposes only. If the Society releases a copy of the report to me I acknowledge this is for information only and that I have no agreement with the valuer.

Neither the Society nor the valuer will warrant, represent or give any assurance to me that the statements, conclusions and opinions expressed or implied in the report will be accurate and valid. I acknowledge neither the Society nor the valuer have any responsibility to me (if I base my decisions on the report) even if the valuer has been negligent.

## 8. Additional Comments

## 9. Your Personal Information and what we do with it

We are a data controller of your personal information. The way that we process your personal information is described in our Privacy Notice. This information is also available on our website [www.chorleybs.co.uk/privacy](http://www.chorleybs.co.uk/privacy)

## 10. General & Membership Declarations

I apply for a loan, which I understand will be secured on my property based on the information I have supplied.

If I am an individual I apply to be a Borrowing Member according to the Rules of the Society, copies of which are available from the Society's Principal Office or any branch. If this is a joint application by individuals I understand that the First Applicant will be the person named first in the Society's records in respect of the mortgage and will be the Representative Joint Borrower according to the Rules (provided that individual is a Borrowing Member).

I understand that if I am a Body Corporate or am applying as a bare trustee for a Body Corporate, that a Body Corporate cannot be a Borrowing Member of the Society and so no person will enjoy voting rights in respect of the mortgage under the Rules.

I consent to the Society at any time transferring or otherwise disposing of the benefit of any loan, mortgage, or any other security for the loan to any third party, whether or not a building society or associated body of a building society, without any further reference to me.

If I am a Borrowing Member at that time I acknowledge that such a transfer will lead to the termination of my borrowing membership of the Society and the loss of my rights as a Borrowing Member of the Society.

## 10a. Personal Associations

Information held about me by the credit reference agencies may already be linked to records relating to one or more of my partners. For the purposes of this application we may be treated as financially linked and my application will be assessed with reference to any 'associated' records of my partners. By stating a financial association with another party, I also declare that the Society is entitled to disclose information about my joint applicant and/or anyone else referred to by me; also search, link and/or record information at credit reference agencies about me and/or anyone else referred to by me;

An 'association' between joint applicants and/or any individual identified as my financial partner will be created at credit reference agencies which will link our financial records. I and anyone else with whom I have a financial link understand that each other's information will be considered in all future applications by either or both of us. This linking will continue until one of us successfully files a 'disassociation' at the credit reference agencies.

## 10b. Keeping you up to date with our Products and Services

From time to time the Society will send you information about other products and services we offer by post. We will only do this where we believe we have a legitimate interest to do so and it is not to the detriment of your interests, fundamental rights and freedoms. More information can be found in our privacy notice.

We also want to provide you with this information by Email and Telephone. If you do not wish to receive such material by these methods then please tick the appropriate boxes.

### 1st Applicant

Email  Telephone

### 2nd Applicant

Email  Telephone

## 10c. Personal Details

- I am over 18 years of age;
- There are no existing loans or mortgages in my name with the Society or any other lender other than declared on this application form;
- I have never been convicted of any criminal offence nor is any prosecution pending, excluding motoring or 'spent' offences by virtue of the Rehabilitation of Offenders Act 1974 or the Rehabilitation of Offenders Act (Northern Ireland) Order 1978;
- Any person interested now or in the future in the loan may rely upon the truth and accuracy of the information given and in any supporting documentation or information supplied by me;
- If any of the information I have given changes before the mortgage is completed, I shall advise the Society immediately.

## 11. Signature Authority

This is our standard mortgage application upon which we intend to rely. For your own benefit and protection you should read the declarations carefully before signing this application. If you do not understand any point please ask for further information.

- I have read and understood the Society's Privacy Notice, which describes the way my personal information will be processed.
- I confirm that I have reviewed all the information provided in the Decision in Principle form and confirm this is true and correct.
- I confirm that I have received, read and understood the European Standard Information Sheet (ESIS) for the mortgage I am applying for prior to completing this form.
- I confirm that I have read all answers including those completed in other than my own handwriting and confirm that all answers are correct and complete.
- To the best of my knowledge and belief the statements in this application and Decision in Principle form are true and correct. Any mortgage agreement made by Chorley Building Society will be based on these statements.
- I authorise you to take up references and check my identity in such ways that are deemed necessary.
- I understand a Tariff of Charges is available on request.
- I understand the arrangements for solicitor/conveyancer, and that I will be liable for the Society's costs in this respect.
- I authorise my chosen solicitor to speak directly with my intermediary
- If my application does not proceed to completion, my customer data may be held by the Society and be used for statistical analysis.
- Declarations to be signed by all applicants.

## Signature(s) of Applicant(s)

### 1st Applicant

Date

### 2nd Applicant

Date

## 12. Self Build Mortgage Documentation Required

Project Information				
<b>Planning Permission</b>	<b>Required</b>			
A full size copy of plans - floor plans and elevations				
Copy of your planning permission				
Copy of your outline planning permission				
<b>Certification</b>	<b>Required</b>			
Full name, address, qualifications and a copy of your Architects PI cover; or details of your Structural Warranty Provider				
If renovating a listed building, evidence that the builder, contractor and PM have experience in listed renovations				
<b>Fees</b>	<b>Required</b>			
Application Fee - can be paid by card by calling 01257 235001 or send a cheque with the application				
<b>Build Finance</b>	<b>Required</b>			
Full details and evidence of funds you are contributing to the project costs				
Gifted deposit evidence (if applicable)				
<b>Other Forms</b>	<b>Required</b>			
Buildloan Packaging Submission Form				
Project Costings (inc. name, contact details of person completing and date)				
Buildloan Stage Release Payment Schedule				
Buildloan Project Cost Evaluation Form				
Confirmation of Build out Cover				
Asset & Liability Form				
Copy of site insurance				
If Custom Build - Lender site briefing pack				
<b>Applicant Information</b>	<b>App 1</b>	<b>App 2</b>	<b>App 3</b>	<b>App 4</b>
<b>Bank Statements</b> - latest month's bank statements				
<b>Income Verification</b>				
Last 3 months payslips and P60				
Last 2 years full and final accounts or SA302's and corresponding tax overviews				
<b>Identification</b>				
<p>The Society uses an electronic verification search with its credit reference agency to confirm an applicant's identity and address. In certain situations (where an applicant is not on the electoral roll, where inconsistencies are identified or you have recently moved to a new address) the search may fail, if this applies to you we will request additional paper documents as set out in our identification policy:  <a href="http://www.chorleybs.co.uk/Files/idc.pdf">http://www.chorleybs.co.uk/Files/idc.pdf</a></p>				
<b>Signature Verification</b>				
One of the following: <ul style="list-style-type: none"> <li>• Passport (UK or foreign)</li> <li>• UK photo-card driving licence</li> <li>• UK full old-style paper driving licence</li> <li>• UK Residence permit</li> <li>• UK Blue Badge parking permit</li> </ul>				