



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

Date:

New Self Build Custom Build Conversion/Renovation

Intermediary Name Packager

Level of service given (please tick as appropriate): Advised Execution only FCA Number

If we are paying a procurement fee will any part of this be refunded to the applicant(s)? Yes No If YES, how much will be refunded?

Is the applicant(s) paying a fee to you for arranging the mortgage? Yes No If YES, how much will they pay?

When is the fee payable? On application On offer acceptance On completion

Applicant Details

1st Applicant **2nd Applicant**

Title

Surname

First name(s)

Middle Name(s)

Previous surname

Date of birth

Current Address

Postcode

Postcode

Date moved to current address

Current residency status

First time buyer Yes No Yes No

Current outgoings Mortgage / rent £ Mortgage / rent £

Mortgage O/S £

Mortgage O/S £

Market Value £

Market Value £

Will the current mortgage be repaid in full? If No, please add explanation in Additional Information section Yes No N/A

Yes No N/A

Nationality

Permanent right to reside (only applicable if not British) Yes No *(If the answer is no, please ring the Underwriting team for advice)*

Yes No *(If the answer is no, please ring the Underwriting team for advice)*

Diplomatic Immunity (only applicable if not British) Yes No

Yes No

Have you lived in the UK for 3 or more years Yes No

Yes No

If less than 3 years at current address, please provide previous address

Postcode

Postcode

Date moved to previous address Month Year

Month Year

Date moved out of previous address Month Year

Month Year

We require a minimum of 3 years address history for all applicants – continue in the Additional Information section if necessary.

Accommodation during the Build Phase

What plans do the applicants have for accommodation during the Build Phase?

What will the monthly cost of this accommodation be? (If applicable)

Do you have dependent children? Yes No

If Yes, please provide details below:

Full Name	Date Of Birth	Full Name	Date Of Birth

Please also complete the following for any other proposed occupiers who will NOT be party to the mortgage:

Full Name	Date Of Birth	Dependent
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

Employment Details

	1st Applicant	2nd Applicant
Employment Status	<input type="text"/>	<input type="text"/>
If other, please state here	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Expected retirement age	<input type="text"/>	<input type="text"/>
Basic Gross Salary	£ <input type="text"/> Annual	£ <input type="text"/> Annual
Guaranteed Gross Other <small>(Detail source in the Additional Information section)</small>	£ <input type="text"/> Annual	£ <input type="text"/> Annual
Regular Gross Other <small>(Detail source in the Additional Information section)</small>	£ <input type="text"/> Annual	£ <input type="text"/> Annual
Length of service	Years <input type="text"/> Months <input type="text"/>	Years <input type="text"/> Months <input type="text"/>
Are you in a probationary period? <small>If yes provide details in the Additional Information section</small>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Self-Employed Applicant Details

	1st Applicant	2nd Applicant
Title in company	<input type="text"/>	<input type="text"/>
Company trading name	<input type="text"/>	<input type="text"/>
Nature of business	<input type="text"/>	<input type="text"/>
Expected retirement age	<input type="text"/>	<input type="text"/>
Type of company	<input type="text"/>	<input type="text"/>
How long has the business been trading?	Years <input type="text"/> Months <input type="text"/>	Years <input type="text"/> Months <input type="text"/>
% of shareholding	<input type="text"/> %	<input type="text"/> %
Applicant Share of Net Profit <small>(If sole trader / partnership) Please provide information for last 3 years</small>	£ <input type="text"/> Year End <input type="text"/> £ <input type="text"/> Year End <input type="text"/> £ <input type="text"/> Year End <input type="text"/>	£ <input type="text"/> Year End <input type="text"/> £ <input type="text"/> Year End <input type="text"/> £ <input type="text"/> Year End <input type="text"/>
Applicant Share of Salary / Dividend if Limited Company <small>Please provide information for last 3 years</small>	Salary <input type="text"/> Dividend <input type="text"/> Year End <input type="text"/> Salary <input type="text"/> Dividend <input type="text"/> Year End <input type="text"/> Salary <input type="text"/> Dividend <input type="text"/> Year End <input type="text"/>	Salary <input type="text"/> Dividend <input type="text"/> Year End <input type="text"/> Salary <input type="text"/> Dividend <input type="text"/> Year End <input type="text"/> Salary <input type="text"/> Dividend <input type="text"/> Year End <input type="text"/>

Credit History

Mortgages and other secured loans – (where more space is required please provide further details within the additional information section)
 * If you have Buy to Let properties please complete next section.

	Lender	Address against which the loan is secured	Account Number	Outstanding Term	Outstanding Balance	Monthly Payment	To be repaid?
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No

Mortgaged Buy to Let Properties – please provide details below

Where more space is required please provide further details within the additional information section. If property is unencumbered please state NA in columns marked with a *.

	Rental Address	Lender*	Current Value	Outstanding Term	Outstanding Balance	Monthly Payment	Monthly Rent Received	Mortgage Repayment Type*	To be repaid?
App1 <input type="checkbox"/>									<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>									<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>									<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>									<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>									<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>									<input type="checkbox"/> Yes <input type="checkbox"/> No

Unsecured loans / credit cards / HP – please provide details below

	Lender	Address against which the loan is secured	Account Number	Outstanding Term	Outstanding Balance	Monthly Payment	To be repaid?
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App1 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No
App2 <input type="checkbox"/>							<input type="checkbox"/> Yes <input type="checkbox"/> No

APPLICANT DECLARATIONS **1st Applicant** **2nd Applicant**

Have you had a mortgage in the last 3 years?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever had a mortgage or loan application refused?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever had a County Court Judgement for debt or a loan default registered?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever been declared bankrupt or been subject to an Individual Voluntary Arrangement (IVA)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever entered any arrangements with your creditors or are you party to a voluntary arrangement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you had a court order / decree made against you for debt or is there any such action pending?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever (voluntarily or otherwise) had a property repossessed by a lender or entered any arrangements for mortgage arrears?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you, any member of your family, or any person living with you, ever been cautioned, convicted or charged (but not yet tried) in respect of any criminal offence (excluding motoring convictions)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If the answer is YES to any of the above, please enter full details below.
If further space is needed, please provide details in the additional comments section.

1st/2nd/Joint	Type (i.e. Mortgage, IVA, CCJ)	Reason	Date	Amount	Date satisfied / still outstanding

Monthly Income			
Net monthly take home pay (applicant 1)		£	
Net monthly take home pay (applicant 2)		£	
Any other income		£	
Please state source of other income			
Total Income:		£	
Monthly Expenditure During Build		Monthly Expenditure Post Build	
Cost of accommodation during build	£		
Mortgage on another property	£	Mortgage on another property	£
Secured Loans	£	Secured Loans	£
Personal Loans	£	Personal Loans	£
Credit Card Minimum Payments	£	Credit Card Minimum Payments	£
Store Card Minimum Payments	£	Store Card Minimum Payments	£
Hire Purchase / Lease Agreements	£	Hire Purchase / Lease Agreements	£
Home Shopping Credit Minimum Payments	£	Home Shopping Credit Minimum Payments	£
Help to Buy Loan (if applicable)	£	Help to Buy Loan (if applicable)	£
Overdraft Usage Charges / Interest	£	Overdraft Usage Charges / Interest	£
Nursery / Child Minding / School Fees	£	Nursery / Child Minding / School Fees	£
Maintenance / Alimony	£	Maintenance / Alimony	£
Cost of Funding Repayment Strategy	£	Cost of Funding Repayment Strategy	£
Mobile Phone Contract	£	Mobile Phone Contract	£
Food Housekeeping Costs	£	Food Housekeeping Costs	£
Broadband / Home Telephone	£	Broadband / Home Telephone	£
Council Tax	£	Council Tax	£
Gas & Electricity	£	Gas & Electricity	£
Water	£	Water	£
Other Utilities (ie Calor Gas, Oil)	£	Other Utilities (ie Calor Gas, Oil)	£
Insurance (Life/Critical Illness)	£	Insurance (Life/Critical Illness)	£
Mortgage Protection / ASU / Inc Protection	£	Mortgage Protection / ASU / Inc Protection	£
Home Insurance	£	Home Insurance	£
Ground Rent / Service Charges	£	Ground Rent / Service Charges	£
Car Insurance / MOT / Car Tax / Maintenance	£	Car Insurance / MOT / Car Tax / Maintenance	£
Travel Costs inc Fuel, Bus, Rail Fares	£	Travel Costs inc Fuel, Bus, Rail Fares	£
TV Licence/TV Package	£	TV Licence/TV Package	£
Other Insurance (Pet/Dental/Health)	£	Other Insurance (Pet/Dental/Health)	£
Clothing	£	Clothing	£
Household Goods & Repairs	£	Household Goods & Repairs	£
Entertainment / Socialising	£	Entertainment / Socialising	£
Smoking / Vaping	£	Smoking / Vaping	£
Hobbies / Gym / Club Membership	£	Hobbies / Gym / Club Membership	£
Holidays and Seasonal Expenses	£	Holidays and Seasonal Expenses	£
Regular Savings	£	Regular Savings	£
Total Expenditure During Build:	£	Total Expenditure Post Build:	£



Details of the Project

Address of property / plot to be mortgaged

Postcode

Do you currently own the plot Yes No

Cost of buying the property / plot

Estimated final value of the property

Total cost of the project (including purchase of the plot / property)

Loan amount required

Source of funds for the project

Property type Property Style

Construction type Year property built (if applicable)

Tenure of the property / plot Is the land free of previous dwelling? Yes No

Has the build started? Yes No S106 / S75 Yes No

ON COMPLETION: Number of floors in property Number of reception rooms Number of bedrooms

Number of bathrooms Number of kitchens Garage Yes No

Builder's name

Builder's address

Project manager's name

Project manager's address

If the applicant is the builder what income will they generate whilst the property is being built? Name of the builders standard indemnity scheme provider or consultant monitoring

Who is selling the plot Are the applicants related to the vendor Yes No

Where will you live whilst the property is being constructed?

Will the property be let out once completed? Yes No Anticipated length of project Months

REMORTGAGES AND CAPITAL RAISING ON MORTGAGE FREE PROPERTY / LAND ONLY

Is the property unencumbered Yes No

Current Lender (if applicable)

Outstanding balance on mortgage (if applicable)

How long have you had your current mortgage on this property/land? Years Months

How long have you owned the property/land? Years Months

What was the original purchase price?

How much of the loan is required for:

Build costs (Please provide details in the additional comments section)

Repayment of Outstanding Mortgage(s)

Debt Consolidation (Please provide details in the additional comments section)

* Please attach the applicants self-build questionnaire.



Loan Requirements

Loan amount required	<input type="text"/>	Term	<input type="text"/>
Repayment type during build	<input type="text"/>	Repayment type post build	<input type="text"/>
If interest only or part interest only post build detail Repayment Strategy	<input type="text"/>	If interest only or part interest only post build detail the amount of interest only	<input type="text"/>
Will business be conducted at the property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Product Scheme Number Recommended	<input type="text"/>		
Have customers asked to add on fees where allowed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

Additional Information



I confirm that I have informed my client about the way the Society processes my clients' personal information, and that consent has been obtained for The Chorley Building Society to carry out a credit search.

Intermediary signature:

For Chorley Building Society use only

Affordability ID

ESIS Number