



INDIRECT MORTGAGE APPLICATION FORM

A: APPLICANTS

First Applicant

Second Applicant

Title (Mr/Mrs/Dr etc)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Forename(s)	<input type="text"/>	<input type="text"/>
Previous Surnames	<input type="text"/>	<input type="text"/>
(Date of Change)	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
National Insurance No	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>	<input type="text"/>
Expected Retirement Age	<input type="text"/>	<input type="text"/>
Telephone (Home)	<input type="text"/>	<input type="text"/>
Telephone (Mobile)	<input type="text"/>	<input type="text"/>
Email Address	<input type="text"/>	<input type="text"/>
Dependent Children	<input type="text"/>	<input type="text"/>
Names & Dates of Birth	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Present Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Residential Status	<input type="text"/>	<input type="text"/>
Time at this Address	Years Months	Years Months
Previous Address	<input type="text"/>	<input type="text"/>
(5 year history required)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	Years Months	Years Months

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



INDIRECT MORTGAGE APPLICATION FORM

B: Income and Employment

Employed

First Applicant

Second Applicant

Name & Address of Employer

Job Title

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Length of Service (3 year history needed)

Years	Months
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Years	Months
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Name & Address of Previous Employer

Telephone Number

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Email Address

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Job Title

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Length of Service (3 year history needed)

Years	Months
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Years	Months
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INDIRECT MORTGAGE APPLICATION FORM

Income and Employment

Gross Income Figures

	First Applicant	Second Applicant
Basic Annual Income	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Regular Overtime	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Regular Bonus	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Regular Commission	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Private Pension	£ <input type="text"/> per annum	£ <input type="text"/> per annum
State Pension	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Rental Income	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Car Allowance	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Shift Allowance	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Housing Allowance	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Maintenance (By Court Order)	£ <input type="text"/> per annum	£ <input type="text"/> per annum

Second Job

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

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

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INDIRECT MORTGAGE APPLICATION FORM

Self-Employed

	Applicant 1	Applicant 2
Business Name	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Limited Company	Yes No	Yes No
Sole Trader	Yes No	Yes No
Share of Profit	<input type="text"/>	<input type="text"/>
Partnership	Yes No	Yes No
Share of Profit	<input type="text"/>	<input type="text"/>
Start Date of Trade	<input type="text"/>	<input type="text"/>
Accountants Name	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Telephone Number	<input type="text"/>	<input type="text"/>
Email Address	<input type="text"/>	<input type="text"/>



INDIRECT MORTGAGE APPLICATION FORM

Self-Employed Income

	Applicant 1	Applicant 2
Sole Trader/Partnership	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>
Net Profit	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>

Directors

Salary	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>
	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>
	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>
Dividends	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>
	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>
	£ <input type="text"/> Year to <input type="text"/>	£ <input type="text"/> Year to <input type="text"/>

C: MORTGAGE REQUIRED

BTL Product Required

Details of Mortgage Required

Total Amount Required

Term of Loan

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

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

mutual@srbs.co.uk 01785 223212 srbs.co.uk



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

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

mutual@srbs.co.uk 01785 223212 srbs.co.uk



INDIRECT MORTGAGE APPLICATION FORM

E: DETAILS OF PROPERTY TO BE MORTGAGED

Address of Property	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name & Address of Vendor/Agent Selling	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Contact Number	<input type="text"/>
Homebuyers Report Required	<input type="text" value="Yes"/> <input type="text" value="No"/>
Building/Structural Survey Required	<input type="text" value="Yes"/> <input type="text" value="No"/>
Estimated rental income per calendar month	<input type="text" value="£"/>
Purchase Price/ Current Valuation	<input type="text" value="£"/>
Date of Construction	<input type="text"/>
Is this a Right to Buy Application	<input type="text" value="Yes"/> <input type="text" value="No"/>



INDIRECT MORTGAGE APPLICATION FORM

E: DETAILS OF PROPERTY TO BE MORTGAGED

Please tick which apply:-

House	<input type="checkbox"/>	Detached	<input type="checkbox"/>
Flat	<input type="checkbox"/>	Semi-Detached	<input type="checkbox"/>
Maisonette	<input type="checkbox"/>	Terrace (End/Mid)	<input type="checkbox"/>
Bungalow	<input type="checkbox"/>	Freehold	<input type="checkbox"/>
Floors (Flat Only)	<input type="checkbox"/>	Leasehold	<input type="checkbox"/>

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:-

Unexpires term of lease	<input type="text"/>
Maintenance Charge	<input type="text"/>
No of Living Rooms	<input type="text"/>
No of Bedrooms	<input type="text"/>
No of Kitchens	<input type="text"/>
No of Bathrooms	<input type="text"/>
No of Toilets	<input type="text"/>
No of Garages	<input type="text"/>

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

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INDIRECT MORTGAGE APPLICATION FORM

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

G. OTHER INFORMATION

Please answer the following questions very carefully. Any incorrect answer may lead to your application being declined - please delete as applicable:

Is the advance required for the purchase of the property?	Yes	No
Is the property for the applicants own occupation?	Yes	No
Are all applicants ordinarily resident in the United Kingdom?	Yes	No
Is any other money towards the purchase price being borrowed?	Yes	No
Will the property be occupied by anyone over 17 other than the applicants?	Yes	No
Has any applicant ever been made bankrupt or had a county court judgement, default or IVA registered against them in the last 5 years?	Yes	No
Any missed loan or credit card payments or overdraft limit been exceeded?	Yes	No
Has any applicant ever been in arrears with mortgage or rent payments?	Yes	No
Are you a first time buyer?	Yes	No
Are you being gifted the deposit?	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
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

J: MARKET RESEARCH

Please indicate which of the following best describes your reason for applying to the Society

Leaflet Drop	<input type="checkbox"/>	Existing Society member	<input type="checkbox"/>
Personal Recommendation	<input type="checkbox"/>	One off promotion	<input type="checkbox"/>
Professional Recommendation	<input type="checkbox"/>	Local Radio/Press Advert	<input type="checkbox"/>
Shopping Around	<input type="checkbox"/>		

K: FUTURE SPENDING PLANS

Please provide details, including amounts, of any large financial transactions/plans for the next three years e.g. Mortgage redemption, Home Improvements, Holidays, etc....& any changes to employment or major life events

EXPENDITURE TYPE	DATE	AMOUNT
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

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INDIRECT MORTGAGE APPLICATION FORM

L. LENDING INTO RETIREMENT DECLARATION

When the mortgage is ongoing after the Applicants retire a declaration of intent to pay the mortgage from the pension funds, please provide details of pensions to be drawn down. Please provide projections of State and Private Pensions:-

M. SUPPLEMENTARY INFORMATION

Please provide additional details or any further information which you wish to draw to the Society's attention. Where appropriate, please indicate the section to which the additional information relates.



INDIRECT MORTGAGE APPLICATION FORM

To be completed by Intermediary

Name of Broker

FCA Number

L&G agency number

Business Address

Email Address

Contact Telephone Number

Please circle the level of service which you have given Recommendation Information Only

Please tick here to confirm that you have issued a KFI for our mortgage product

The Society is required to include in the APR any fee which you charge the borrower £

Please indicate the fee charged in the box

Please indicate who procurement fees are payable to

Please indicate which mortgage club you belong to Legal & General Other



INDIRECT MORTGAGE APPLICATION FORM

To be completed by Intermediary

Please indicate which mortgage network you are part of

This will be issued by cheque. Cheques can only be made payable to a company and NOT individual introducers. Please tick to confirm you have completed and attached the budget planner.

Declaration under the Data Protection regulations including the General Data Protection Regulation (EU 2016/679) ('GDPR') between the Intermediary ('Broker') and the Stafford Railway Building Society ('Lender').

The Broker supplying Relevant Personal Data confirms that:

1. Such Relevant Personal Data is accurate and up to date;
2. The identity of the Lender receiving such data is disclosed to the data subject(s);
3. A GDPR compliant consent is obtained from the Data Subject(s) (or that another lawful ground exists), to authorise disclosure of the Data Subjects' contact information to the Lender.
4. The Broker has directed the client(s) to the Lender's website, to read the Lender's privacy notice, as part of the Broker's recommendation process, so that the client(s) have the opportunity to understand how the data contained within their application will be used by the Lender.

The Lender receiving Relevant Personal Data shall ensure that:

1. It is processed only for the purpose of the agreement between the parties;
2. The identity of the party supplying such information is disclosed to the Data Subject(s);
3. The Lender's privacy notice is kept up to date.

Both the Broker and the Lender shall comply with the GDPR in all aspects and in particular (but not exclusively) shall:

1. Maintain records to demonstrate consents obtained and withdrawn by Data Subjects (including, but not exclusively, the date of consent or withdrawal of consent, the method of consent, who obtained consent, and what information was provided to the Data Subject consenting);
2. Only provide Relevant Personal Data using secure methods and maintain at all times appropriate technical and organisational measures to avoid a Personal Data Breach (and in the event one occurs and at the expense of the party in breach use reasonable endeavours to minimise the impact and prevent recurrence);
3. Provide such information and assistance as the other party may reasonably require to comply with its own obligations;
4. Avoid causing or permitting anything to be done that might cause the other party to be in breach;
5. Respond to and deal with any Enquiry;
6. Notify the other party in relation to any Enquiry, or Personal Data Breach, that relates to the other party's processing of Personal Data as Controller.

Signature of Broker

Qualifications of Broker

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

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INDIRECT MORTGAGE APPLICATION FORM

Agreement and Declaration

Each Applicant who signs below agrees and declares:

1. That if this application is made in joint names, the mortgage interest payments in connection with any loan made by the Society will be made for and on behalf of all applicants, and that the mortgage is for the benefit of all applicants.
2. That to the best of their knowledge and belief the answers given are true and all material information has been disclosed.
3. That they will inform the Society immediately of any changes in the information given in this application.
4. That some or all of the data in this application may be processed by the Society and used in accordance with its registration under Data Protection legislation, including Data Protection Act 1998, General Data Protection Regulation (EU), and any legislation that, in respect of the United Kingdom, replaces or converts into domestic law the General Data Protection Regulation (EU), or other law relating to data protection as a consequence of the United Kingdom leaving the European Union. They acknowledge that they have the right of access to any such records, and to other information about them held by the Society, on application to the Society's principal office. Full details of data protection rights are contained within the Society's Privacy Notice, which has been supplied and received, as part of this application.
5. That the Society may make such enquiries of its credit reference agency, any past or present employers or other sources, as it considers necessary and if this application is granted, the Society may pass on to such an agency information relating to the conduct of the account. Details of the account may be seen by other organisations that make searches.
6. That the Society will make searches at credit reference agencies which will supply the Society with credit information as well as information from the Electoral register. The agencies will record details of the search whether or not the application proceeds. Credit searches and other information that is provided to the Society about them and those with whom they are linked financially will be used by the Society in assessing this mortgage application.
7. That they understand that the Society will carry out an electronic search to verify their identity and address and that by signing this declaration they consent to such a search being carried out. If the search is unsuccessful the Society will request documentary evidence of their identity and address before the application can be processed.
8. That the applicant authorises the Society to share information with third parties about the conduct and operation of the mortgage account.
9. That they will be responsible for the costs of the Society's solicitors whether or not the loan is completed.
10. That they accept that the Society may at any time before any loan offered is completed, withdraw, revise or cancel the offer.
11. That the information given will be the basis of the contract and if necessary this application shall be a proposal by them to an insurance company providing insurance cover for the Society where additional security protection is required. Any confidential information required by the insurance company either before or after completion of the loan may be given by the Society and they will pay any charge in connection with the Society arranging this mortgage application.
12. That if the Society offers a loan, they authorise any solicitor acting on their behalf to disclose to the Society information relevant to the Society's decision to lend and they waive any right of solicitor-client confidentiality or legal professional privilege in respect of such information. A copy of this application may be provided to the Solicitor.
13. That they have not been convicted of or charged with any criminal offence other than motoring offences. (This declaration does not apply to convictions regarded as spent by virtue of the Rehabilitation of Offenders Act 1974).



INDIRECT MORTGAGE APPLICATION FORM

Agreement and Declaration

1. That they understand that if a mortgage valuation is required the report is prepared solely for the use of the Society in considering this application, and no responsibility for the value or condition of the property is implied or accepted by the Society or valuer.
2. That they agree that the Society may at any time assign, transfer or charge the mortgage granted to it to secure the loan for which they are applying and that the assignee, transferee or charges may not be a building society or associated body of a building society. They understand that upon assignment or transfer they will cease to be a borrowing member of the Society.
3. They understand that if any answer has been written or answered by any other applicant, that person shall for that purpose be regarded as acting for them and not for the Society.
4. They understand that the Society will only be able to instruct their Solicitor to act on its behalf if the firm has more than one partner. In the event that the Society is not able to use their solicitor they understand that the Society will instruct its own solicitors. Their charges in this matter will be passed on to the applicants.
5. They confirm that they are able to make the repayments required in respect of the mortgage applied for.
6. That in signing this application they authorise the Society to disclose relevant confidential financial information to any third party guarantor.
7. That by signing this application they consent to the use of their personal information as specified in the paragraphs above.
8. That the Society will use the applicant's information for the purposes of considering the application and administering the mortgage.
9. The Society would like to be able to write to you about other products and services, which may be of interest.
Please confirm your agreement for the Society to contact you for marketing purposes by:

Post Telephone Email No Marketing

Applicant 1

Date

Applicant 2

Date

Applicant 3

Date

Applicant 4

Date



INDIRECT MORTGAGE APPLICATION FORM

References

The Society will send for references from your Employer. To enable us to process your application speedily please complete all sections:-

Employer

FAO	<input type="text"/>
Applicants Full Name	<input type="text"/>
Present Address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/>
Name & Address of your Employer	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Payroll Reference	<input type="text"/>
Employers Telephone Number	<input type="text"/>
Employers Email Address	<input type="text"/>

I authorise you to supply Stafford Railway Building Society with any information about me as they request.

Signed	<input type="text"/>
Date	<input type="text"/>



INDIRECT MORTGAGE APPLICATION FORM

References

The Society will send for references from your Accountant. To enable us to process your application speedily please complete all sections:-

Employer

FAO	<input type="text"/>
Applicants Full Name	<input type="text"/>
Business Name Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Name & Address of your Employer	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Payroll Reference	<input type="text"/>
Accountants Telephone Number	<input type="text"/>
Accountants Email Address	<input type="text"/>

I authorise you to supply Stafford Railway Building Society with any information about me as they request.

Signed	<input type="text"/>
Date	<input type="text"/>