

Please complete as much information in each section as possible - Missing personal information can affect our ability to provide full advice and missing property information will have to be pursued further in order to complete applications

Section 1 – Personal Details	Applicant One	Applicant Two
Full name: <i>(incl title, first, middle and surnames etc)</i>		
Date of Birth:		
Marital Status*:		
National Insurance Number:		
Current address:		
Date moved in/Length at address:		
Any dependants: <i>(incl age and name)</i>		
Home Telephone:		
Mobile Telephone:		
Email:		
Have you ever changed your name by marriage or deed poll if so previous name and date changed		
Nationality*: <i>(date moved to UK if not UK resident, do you have Permanent Right to Reside?)</i>		
Previous address including date moved in: <i>(3 years history is required, use additional information box if necessary)</i>		
Residential Status: (Home owner, tenant, living with relatives)		
If tenant amount of rent paid per month:		
Current Residential mortgage lender: <i>(if applicable)</i>		
Mortgage reference number:		
Amount of current mortgage:		
Residential property value:		
Current mortgage term:		
Monthly mortgage payment:		
Current mortgage rate and type: <i>(i.e. fixed / tracker / variable etc)</i>		

Section 2 – Employed Details		
Employers name:		
Occupation/Job Title and Industry:		
Time in current employment:		
Employers address:		
Current Salary: <i>(plus details of overtime / bonus)</i>		
Section 3 – Self Employed Details		
Occupation and Industry:		
Trading Name / Business Name:		
Business Address:		
Years trading:		
Net Income for last three years:	1 2 3	1 2 3
Accountants Name and Address:		
Section 4 – Expenses		
Monthly Expenditure:		
Mort / Rent - Council Tax - Utilities - Food/Clothing - Car - Travel - Mobile Phone - Telephone/Broadband - Social Expenses - Insurances - Pensions - Alimony/Childcare - Holiday - Savings/Investments - Other -		

Section 5 – Credit Information		
Details of the outstanding loans and credit cards incl: <ul style="list-style-type: none"> • <i>Lenders name</i> • <i>Balance outstanding</i> • <i>Monthly payment</i> 		
Bank Details for direct debit purposes: <i>Bank Name</i> <i>Account Name</i> <i>Sort Code</i> Account Number		
Detail of any defaults, eg CCJs, missed payments: <i>(this will affect the choice of lender and may affect your credit history if information comes to light at a later date)</i>		
Have you ever had any criminal convictions?*:		
Section 6 – Property Details (future/to be mortgaged)		
Address:		
Property Type: <i>(house, flat, bungalow Terraced, Semi, Detached, Purposed built or conversion flat)</i>		
Leasehold Property Details: <i>(e.g. ground rent, service charge)</i>		
Leasehold Term: <i>(If leasehold, how many years remaining)</i>		
Number of bedrooms:		
Number of additional rooms: <i>(living rooms, bathrooms, kitchens, also garages)</i>		
Build Year:		
Non standard details about the property: <i>(e.g. listed building, construction type, thatched roof, above retail, no. of floors etc)</i>		
Property Value:		
Estate Agent or selling agent: <i>(contact name, number and address if applicable)</i>		
Type of mortgage required: <i>(Purchase, Remortgage, Buy to Let)</i>		
Loan amount required:		

Amount of deposit available:		
Term of mortgage required:		
Rate type required: <i>(fixed / tracker / variable)</i>		
Tie in period required: <i>(e.g. 2 year fixed rate)</i>		
Existing mortgage details: <i>(lender, reference, amount, payment)</i>		
Section 7 – BTL Details		
If BTL what is the monthly rental:		
Number of tenants:		
Tenant type: <i>(family, DSS, student)</i>		
Do you have any other properties: <i>(Provide full details, using the additional pages below including address, value of property, mortgage amount, rental amount etc)</i>		
Section – 8 Additional Information Required		
Do you have any additional income: <i>(pension, investment etc)</i>		
Do you have a Will?:		
Do you have... Life Insurance: <i>(pays in the event of death to cover a mortgage)</i> Critical Illness: <i>(paid in the event of a terminal illness)</i> Income Protection: <i>(paid in the event of loss of income)</i>		
Any assets: <i>(property, investments etc)</i>		
Solicitor acting on your behalf (if you don't have one we can recommend one to you)		
Are you or are any members of your family and/or close associates (socially or professionally): <ul style="list-style-type: none"> • A Head of State or Government • A senior politician • A senior government, judicial or military official • A senior executive of a state-owned corporation • An important political party official? 		
Smoker / Non-Smoker*: <i>(If you have ever smoked, for how long and when did you quit?)</i>		
* (Sections 1, 5 & 8) For further information please see and sign the Special Categories of Sensitive Personal Data section)		

Additional Information to Provide to MMS	Applicant One	Applicant Two

I confirm all information provided above is correct to the best of my knowledge.

Special Categories of Sensitive Personal Data

I also give explicit consent for Making Mortgages Simple, and The On-Line Partnership Group Limited, to process special categories of sensitive personal data(*) relating to me, in order to:

Purpose <i>(Enables the provision of...)</i>	Identify Type of data provided (*)	All parties to initial / sign each item	Date
* professional opinions and high quality recommendations, * ensuring advice is suitable to you and meets compliance standards set by the Financial Conduct Authority (FCA) * application(s) for a specified product or products.	<input type="checkbox"/> <i>Data concerning health.</i> <input type="checkbox"/> <i>Personal data relating to criminal convictions and offences</i>		

I understand that you may pass this information on to a named product provider during the product application process. My sensitive personal data will be handled only by staff necessarily involved in these processes and at all times my sensitive personal data will be kept secure and confidential. Once my data has been passed to a named product provider, they will provide me with a privacy notice in respect of the processing they will carry out as a data controller in their own right. My data will be retained in line with the FCA's record keeping requirements.

I understand that my consent may be withdrawn at any time as outlined in the privacy notice.

Client Name(s)		
Client Signature(s) and Date		
Client Address(es)		