

Payment Term Lifetime Mortgage

Application Form

This form summarises the content of your application for a mortgage with Legal & General as provided by yourself to your mortgage adviser. Please read the content and contact your adviser if any of the information is incorrect or has changed. If all of the information is correct please keep a copy for your records. This is not a formal mortgage offer and is provided for information purposes only.

Adviser details

Name of Adviser:	<input type="text"/>		
Company Name:	<input type="text"/>		
Address:	<input type="text"/>		
Postcode:	<input type="text"/>	Email:	<input type="text"/>
Contact number:	<input type="text"/>		
FCA Number:	<input type="text"/>		
Mortgage Club:	<input type="text"/>		
Application Ref:	<input type="text"/>	Date application submitted:	<input type="text"/>
Product:	<input type="text"/>		

Which service are you providing your client with?

Advised: Not Advised:

How was the advice provided?

Face to face: Telephone: Video Call:

Is your client remortgaging their current property or purchasing a new property?

Remortgage: Purchase:

Mortgage loan details

Estimated value (remortgage): Purchase price (if purchasing):
How much does the applicant wish to borrow?: Interest rate (MER %): %

Monthly Interest Payments:

Monthly Interest Payment: (Please refer to the definitions section at the back of this form for details.)
Chosen Payment Term: years months

Inheritance Protection:

Percentage of net sale proceeds to protect: %

Purpose of loan (for remortgage)

How will the loan amount be allocated?	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>

If applicant has any other purposes for the loan, these are shown in the additional sheets at the end of the application form.

Source of deposit (for house purchase)

What is the source of the deposit?	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>
	<input type="text"/>	Amount: <input type="text" value="£"/>

If applicant has any other source of deposits, these are shown in the additional sheets at the end of the application form.

Applicant details**Applicant 1****Applicant 2**

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>
Gender:	Male: <input type="checkbox"/> Female: <input type="checkbox"/>	Male: <input type="checkbox"/> Female: <input type="checkbox"/>
Date of birth:	<input type="text"/>	<input type="text"/>
Current age:	<input type="text"/>	<input type="text"/>
Date expecting to retire:	<input type="text"/>	<input type="text"/>
Nationality:	<input type="text"/>	<input type="text"/>
Marital status:	<input type="text"/>	<input type="text"/>
Relationship with first applicant:		<input type="text"/>
National Insurance Number:	<input type="text"/>	<input type="text"/>
Address:	<input type="text"/>	<input type="text"/>
Postcode:	<input type="text"/>	<input type="text"/>

Is the applicant known by any other name?:

If 'yes' please provide details below.

Yes: No: Yes: No:

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>

If applicant has any other previous names, these are shown in the additional sheets at the end of the application form.

Residential Status:

From: To:

From: To:

Does the applicant have the right to reside in the UK?:
 Yes: No:

Yes: No:

Length of Residency in UK: Years Months

Years Months

Has the applicant ever had a UK address?:
 Yes: No:

Yes: No:

Has the applicant lived less than 3 years at the current address?:
 Yes: No:

Yes: No:

Previous Residential status:

Previous address(es) (if changed within last 3 years):

Postcode:

Time at previous address(es):
 From: To:

From: To:

If applicant has any other previous addresses within the last 3 years, these are shown in the additional sheets at the end of the application form.

Contact details

Please tick preferred method of communication.

Tel. Home:

Tel. Work/ Mobile:

Email:

Special requirements

Does the applicant require printed communication in a different format?
 Yes: No:

Yes: No:

Format required:

Is there a Power of Attorney acting on behalf of the Applicant for this transaction?:

Yes: No:

Yes: No:

Power of Attorney details

Is the attorney a company?:

Yes: No:

Yes: No:

Company name:

POA Type:

POA Authority:

Is the POA document stamped and sealed by Office of Public Guardian?:

Yes: No:

Yes: No:

Attorney personal details

Title:

First name:

Middle name:

Surname:

Date of birth:

Address:

Postcode:

Contact telephone number:

Email:

Special requirements

Does the attorney require printed communication in a different format?:

Yes: No:

Yes: No:

Format required?:

If applicant has any other additional attorneys, these are shown in the additional sheets at the end of the application form.

Employment status:

Job title:

Nature of business:

Occupation:

Company name:

Company address:

Company postcode:

Company telephone number:

Employed from:

Employed to:

Full time?: Yes: No:

Does the applicant own more than a 20% share?: Yes: No:

Is employment permanent?: Yes: No:

Is applicant still within probationary period?: Yes: No:

Is the applicant employed by a family member?: Yes: No:

Yes: No:

Yes: No:

Yes: No:

Yes: No:

Yes: No:

If the applicant is on a fixed-term contract

Has the contract previously been renewed?: Yes: No:

Will current contract be renewed?: Yes: No:

Yes: No:

Yes: No:

Gross basic annual salary: £ Car allowance: £

Other allowances: £ Commisison: £

Overtime: £ Bonus: £

Gross basic annual salary: £ Car allowance: £

Other allowances: £ Commisison: £

Overtime: £ Bonus: £

Does the applicant have any deductions from salary?: Yes: No:

Monthly amount: £

Yes: No:

£

Source:

Does the applicant have any secondary employment?: Yes: No:

Yes: No:

If so, include details on the Additional Information sheets at the end of this application form.

SELF EMPLOYED OR DIRECTORS WITH MORE THAN 20% SHAREHOLDING

Employment status:

Ownership type:

Name of business:

Address of business:

Postcode:

Nature of business:

Occupation:

Full time?: Yes: No: Yes: No:

Earnings from latest return: £ £

Year ending:

Earnings from previous return: £ £

Year ending:

Percentage of business owned:

Number of partners:

Is all of the income from this employment derived from Buy to Let?: Yes: No: Yes: No:

Date commenced trading:

Is there an accountant used to prepare accounts?: Yes: No: Yes: No:

Accountants company name:

Qualifications:

Accountant's name:

Address:

Postcode:

How long have the accountants acted for the applicant?: Years: Months: Years: Months:

Previous employment**Applicant 1****Applicant 2**

Have you been in your employment for less than 24 months?:

Yes: No:

Yes: No:

Employment status:

From: To:

From: To:

Other income sources**Applicant 1****Applicant 2**

Does the applicant have any other source of income?:

Yes: No:

Yes: No:

Description of other source of income:

Annual amount of other income:

£

Annual amount of other income:

£

Future changes of income**Applicant 1****Applicant 2**

Is the applicant aware of any adverse changes to their income and expenditure that are likely to affect their ability to meet their mortgage payments?:

Yes: No:

Yes: No:

If so, these details have been included on the Additional information sheets at the end of this application form.

Current residency/occupancy**Applicant 1****Applicant 2**

(For joint applicants, if mortgages or other commitments are shared, the information should be given only once or entered as zero)

Existing residential mortgage to be redeemed or property sold on completion?:

Yes: No:

Yes: No:

Reason for not redeeming or selling on completion:

Monthly residential mortgage/rental payment:

£

£

Residential mortgage balance outstanding:

£

£

Estimated value of current residential property:

£

£

Start date of current mortgage:

Other commitments (non-lifestyle)

Does the applicant have any other binding financial commitments?:

Yes: No:

Yes: No:

Commitment type:

Monthly payment:

£

£

End date:

Repay on Completion?:

Yes: No:

Yes: No:

Source of funds for debt repayment:

Other mortgages or secured loans

Does the applicant have any other mortgages or secured loans (excluding Buy to Let)?:

Yes: No:

Yes: No:

Lender:

Outstanding balance:

£

£

Monthly payment:

£

£

End date:

Repay on Completion?:

Yes: No:

Yes: No:

Source of funds for debt repayment:

Credit or store cards

Does the applicant have any credit or store cards?:

Yes: No:

Yes: No:

Card provider:

Outstanding balance:

£

£

Repay on Completion?:

Yes: No:

Yes: No:

Source of funds for debt repayment:

Unsecured loans

Does the applicant have any unsecured loans?:

Yes: No:

Yes: No:

Lender:

Outstanding balance:

£

£

Monthly payment:

£

£

Financial commitments cont'd

Applicant 1

Applicant 2

End Date:

Repay on Completion?: Yes: No:

Yes: No:

Source of funds for debt repayment:

Mail Order Accounts

Does the applicant have any Mail Order Accounts?: Yes: No:

Yes: No:

Lender:

Outstanding balance: £

£

Repay on Completion?: Yes: No:

Yes: No:

Source of funds for debt repayment:

Household expenditure

Number of non-applicant adult financial dependents:

Child dependents under 18:

Council tax (per month): £

Buy to Let properties

Applicant 1

Applicant 2

For joint applicants, if mortgages or other commitments are shared, the information should be given only once or entered as zero.

Does the applicant own any investment/Buy to Let properties?: Yes: No:

Yes: No:

Total number of properties:

Estimated value of portfolio:

Total outstanding balance of mortgages:

Estimated value of portfolio:

Total outstanding balance of mortgages:

£

£

£

£

Total monthly portfolio rental income:

Total monthly portfolio mortgage payments:

Total monthly portfolio rental income:

Total monthly portfolio mortgage payments:

£

£

£

£

Is the portfolio managed by an agent on the applicants behalf?: Yes: No:

Yes: No:

Security address

Address:

Postcode:

Initial property questions

Is the property being used as security located in England, Mainland Scotland or Wales?

Yes:

No:

Will all applicants own the property when the loan completes?

Yes:

No:

Will the property being used as security be the main residence on completion?

Yes:

No:

Additional property details

What type of property is it, e.g. house, bungalow?

What type of property is it, e.g. detached, terraced?

Original purchase price (if remortgage and you have been in property less than 6 months)

Original purchase date (if remortgage and you have been in property less than 6 months)

How many storeys are there in the block of flats?

On which floor is the flat situated?

Is there access to the flat via a lift?

Yes: No:

Has the property been built in the last 10 years?

Yes: No:

Is the property still under construction?

Yes: No:

Is there a National House Building Council (NHBC) or equivalent certificate?

When was the property built?

How many bedrooms does the property have?

How many kitchens does the property have?

How many bathrooms does the property have?

How many reception rooms does the property have?

How many garages does the property have?

Type of sale (if purchase)?

What is the property tenure?

What term is remaining on the lease?

How much is the ground rent (per year)?

How much is the service charge (per year)?

Wall construction type

Roof construction type

Is the property over or adjacent to a retail or a business premise?

Yes: No:

If yes, please provide a brief description including nature of business and location, e.g. property is next to a hairdressers

Additional property details con't

Is any part of the property or land to be used for commercial purposes?

Yes: No:

Type of business

Percentage of property used for business

 %

Is the property now, (or previously been), a Housing Association (HA), Local Authority (LA) or Ministry of Defence (MOD) property?

Yes: No:

Is the property classed as sheltered accommodation?

Yes: No:

Is the property subject to agricultural restrictions?

Yes: No:

Does the property include more than 5 acres of land?

Yes: No:

Is the property listed?

Yes: No:

What is the listed property grade?

Is there any element of flying freehold?

Yes: No:

Percentage of flying freehold

 %

Is any part of the roof flat?

Yes: No:

What percentage of the roof is flat?
(Please disregard any flat roof on the garage or dormers)

 %

Has property flooding taken place in the last five years?

Yes: No:

Is the affect on the property ongoing or being monitored by a surveyor or has the property been underpinned in the last 5 years?

Yes: No:

Does the property have any age restrictions?

Yes: No:

Fee payable on resale as a percentage of the sale price
(if there is no fee payable on resale, please enter '0').

 %

Does the property have an annex?

Yes: No:

Does the property have extensions that exceed over 50%
of the overall property?

Yes: No:

Are there solar panels installed at the property?

Yes: No:

Are the solar panels owned outright?

Yes: No:

Is the property in a good state of repair and will it be
maintained to this standard?

Yes: No:

Existing lifetime mortgages or applications

Does the applicant(s) have a mortgage with Legal and General Home Finance?

Yes:

No:

Account Number: (If selected 'yes' above)

Does the applicant(s) have any current applications with Legal and General Home Finance?

Yes:

No:

Account Number: (If selected 'yes' above)

Access details

Valuation Type:

Details of who to contact to arrange valuation

Please provide contact details so valuation of the property can be arranged:

Contact:

Contact Name:

Contact Telephone number:

Contact email address:

Please provide any additional information which will help the Valuer to gain access:

Other occupants

Upon completion, will there be any other occupants living at the property who are aged 17 or over and are not named on this application?

First Name:

Surname:

Date of birth:

Relationship:

If applicant has any other occupants to the property, these are shown in the additional sheets at the end of the application form.

Solicitor's details

Solicitor contact name:

Firm name:

Solicitor address:

Postcode:

DX number:

Telephone number:

Fax number:

Email address:

Keeping your customer informed

Applicant 1

Applicant 2

From time to time we'd like to contact you with news, useful information and exclusive offers on our Retirement products and services. If you'd like to be kept up to date, please let us know how you would like to hear from us.

You can opt out of Legal & General Retail Retirement (part of Legal & General) marketing at any time by emailing your details to us at LGRROptout@landg.com

Please contact by phone:

Yes:

No:

Yes:

No:

Please contact by post:

Yes:

No:

Yes:

No:

Please contact by email:

Yes:

No:

Yes:

No:

Please contact by text:

Yes:

No:

Yes:

No:

Customer Declaration

Does the applicant(s) have any criminal convictions other than those which are spent under the Rehabilitation of Offenders Act 1974 (or equivalent), or any pending prosecutions relating to any aspect of dishonesty, (such as theft, robbery, fraud or arson); which may have a bearing on the applicant's future employment or the likely conduct of the mortgage?

Yes:

No:

Pre-requisite Questions

1. Do the applicant(s) satisfy Legal & General's adverse credit criteria?

Yes:

No:

2. Has/Have the applicant(s) ever had a Payday Loan or Home Credit Loan facility?

Yes:

No:

Instruction to your bank or building society to pay by Direct Debit



LEGAL & GENERAL HOME FINANCE LTD
PO Box 17225, Solihull, West Midlands
B91 9US

Account name:	<input type="text"/>		
Account Number:	<input type="text"/>		
Sort code:	<input type="text"/>	Service user number:	<input type="text" value="448189"/>
Reference:	<input type="text"/>		
Bank details:	<input type="text"/>	Postcode:	<input type="text"/>
Preferred payment date:	<input type="text"/>		

Instruction to your bank or building society

Please pay Legal & General Home Finance Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Legal & General Home Finance and, if so, details will be passed electronically to, my bank / building society.

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, Legal & General Home Finance Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Legal & General Home Finance Limited to collect a payment, confirmation of the amount and date will be given to you at the time of request.
- If an error is made in the payment of your Direct Debit, by Legal & General Home Finance or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Legal & General Home Finance Limited asks you to.
- You can cancel a direct debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Direct Debit Declaration

I confirm the applicant(s) have:

1. Confirmed they are the holder(s) of the above account.
2. Confirmed there are no other holders on the above account and that they are the only signatory / signatories.
3. Checked to confirm the above account details are correct.
4. Provided authorisation for this Direct Debit Instruction and the Direct Debit Guarantee has been read by / read to all applicants.
5. Been advised that the company name appearing on their bank statement against this Direct Debit is "Legal & General Home Finance Limited".
6. Been advised that their Direct Debit will not be lodged on their bank account until the mortgage application has been completed.

Terms of Business

I have/the named adviser has read and agree to be bound by Legal & General Home Finance Terms of Business.

Accept declaration

Privacy notice

Please read the following statement to the applicant(s) (or Power of Attorneys where appropriate) and provide them with a copy of the customer privacy notice to ensure their understanding, before completing the application form:

“To protect you and Legal & General Home Finance from financial crime, Legal & General Home Finance may be required to verify the identity of new and sometimes existing customers. This may be achieved by using reference agencies to search sources of information relating to you (an identity search). This will not affect your credit rating. If this fails, Legal & General Home Finance may need to approach you to obtain documentary evidence of identity.”

Our Customer Privacy Notice can be found on our website.

www.legalandgeneralgroup.com/services/privacy-policy/

I have/the named adviser has discussed and agreed these declarations with the applicant and have provided them with a copy of the Customer Privacy Notice.

Accept declaration

Adviser declaration

By submitting this application, you declare that:

I have/the named adviser has passed (and currently hold/s) an appropriate examination in Lifetime Mortgages as prescribed by the Financial Conduct Authority and that I have/the named adviser has provided/supervised this equity release advice and recommendation.

The statements and particulars given in this application are, to the best of your knowledge and belief, true and complete.

You will advise us if there are any other material facts that could influence the outcome of this loan application.

The applicants, or Power of Attorneys where appropriate, have been provided with:

- An illustration for this lifetime mortgage.
- Information explaining why this Mortgage is suitable for them (Suitability Report).
- A copy of Legal & General Home Finance's 'All you need to know' Mortgage product literature.
- A copy of Legal & General Home Finance's Privacy Notice.

Finally, you declare that the Customer has been advised that:

- They should notify and consult with any other person(s) who may have an interest in the property offered as security for this Mortgage.
- By the submission of this application, they authorise the lender for their current mortgage, if applicable, to disclose to any solicitor acting for Legal & General Home Finance or Legal & General Home Finance directly, full details of their existing mortgage.
- While Legal & General Home Finance will arrange for a mortgage valuation report to be completed, this is intended solely for the purposes of considering this application for a loan and a copy of the full report will not be provided to them.
- Legal & General Home Finance are not responsible for any advice provided by mortgage intermediaries or Financial Advisers.

Disclosures

We will disclose the applicant's, or Power of Attorneys, where appropriate, information to other companies within the Legal & General group of companies, regulatory bodies, law enforcement agencies, credit reference agencies, future owners of our business, suppliers we engage to process data on our behalf and when necessary, to a reinsurer.

By submitting this application, you are agreeing to the information as described and confirming that you have / the named adviser has discussed and agreed these declarations with the applicant.

By ticking this box you accept all of these declarations and confirm you wish to submit this application on behalf of the applicant.

Accept declaration

Definitions

Age restricted: Property which can only be purchased (and resided in) by an individual who meets the minimum age criteria within the lease or planning restriction.

Agricultural use: Any part of the property used for farming (arable or pastoral), providing any form of commercial income or having livestock on the property. This may include renting of land to other parties. Small holdings are included in this definition.

Annex: An annex forms part of the main house (as opposed to a self-contained unit which does not). It will provide all of the amenities needed for independent living including kitchen and bathroom, as well as a bedroom. It will also have its own access and can be secured as a separate unit. It shares gas, electric and water supplies with the main property. We will accept properties where the annex is occupied but only with a maximum of two family members or a live in carer.

Flooding: Caused by river water, rain water or coastal flooding.

Heave: Caused when the ground beneath a building moves significantly and moves upwards.

Landslip: This occurs due to a movement of earth down a slope. It can be caused by a retaining wall giving way or the result of nearby excavation. It can also be caused by varying soil types affected by changes in weather/water table, etc.

Lasting/enduring power of attorney (POA): The creation of an enduring power of attorney, or EPA, is a legal process by which an individual hands over to someone else the power to decide what is done with their financial affairs and property. However, the cut-off to make an EPA was the 1st October 2007. From this date, it has not been possible to apply for an EPA and instead individuals will have had to apply for a Lasting Power of Attorney instead. All EPAs made before the cut-off date remain valid. This document can be used before registration by the Court of Protection, however it is essential to ensure that the EPA has not subsequently been withdrawn.

A lasting power of attorney (LPA) is a legal document that lets the individual (the 'donor') appoint one or more people (known as 'attorneys') to help the individual make decisions or to make decisions on their behalf. This document MUST be registered by the Court of Protection before use.

Listed building: For properties in England and Wales, these are listed on British Listed Buildings as properties of special architectural or historic interest. For properties in Scotland, these are listed on Historic Scotland.

Lodger: Person who pays rent in return for accommodation in someone else's house. This will include sharing the kitchen, bathroom and communal areas. If the individual has a tenancy agreement, we will class them as a tenant, and not a lodger.

Monthly interest payments: The amount you will need to pay each month during the payment term.

Outbuildings used for commercial use: Any building which is being used for business purposes or generates an income. For example, stables which are rented to other parties.

Payment term: The period for which the customer chooses to make contractual interest payments.

Professional consultant certificate: As defined by UK Finance (formally the CML). This is used by professional consultants when designing and/or monitoring the construction or conversion of residential buildings. Please refer to the CML website for further information.

Sheltered accommodation: 'Accommodation for elderly or disabled people' consisting of private independent units with some shared facilities and a warden. This is not the same as age restricted properties.

Subsidence: Caused when the ground beneath a building moves significantly and moves downwards.

For further information visit legalandgeneral.com/lifetimemortgages

Call us on **03330 048 444**

Lines are open 8.30am to 5.30pm Monday to Friday. Call charges will vary. Calls may be monitored and recorded.

If applicant has provided any additional information, this will be shown below.

Additional information

Purpose of loan (if remortgage):

How will the loan amount be allocated?	<input type="text"/>	Amount: £	<input type="text"/>
	<input type="text"/>	Amount: £	<input type="text"/>

Source of deposit (if purchase):

What is the source of deposit?	<input type="text"/>	Amount: £	<input type="text"/>
	<input type="text"/>	Amount: £	<input type="text"/>
	<input type="text"/>	Amount: £	<input type="text"/>
	<input type="text"/>	Amount: £	<input type="text"/>
	<input type="text"/>	Amount: £	<input type="text"/>

Is the applicant known by any other name?:

Applicant 1

Applicant 2

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>

Title:	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>

Additional information

Applicant 1

Applicant 2

Previous Residential status:

Previous address(es) (if changed within last 3 years):

Postcode:

Time at previous address(es): From: To:

From: To:

Previous Residential status:

Previous address(es) (if changed within last 3 years):

Postcode:

Time at previous address(es): From: To:

From: To:

Previous Residential status:

Previous address(es) (if changed within last 3 years):

Postcode:

Time at previous address(es): From: To:

From: To:

Previous Residential status:

Previous address(es) (if changed within last 3 years):

Postcode:

Time at previous address(es): From: To:

From: To:

Previous Residential status:

Previous address(es) (if changed within last 3 years):

Postcode:

Time at previous address(es): From: To:

From: To:

Attorney personal details

(POA 2)

First name:

Middle name:

Surname:

Date of birth:

Address:

Postcode:

Contact telephone number:

Email:

Special requirements

Does the attorney require printed communication in a different format?:

Yes: No:

Yes: No:

Format required?:

(POA 3)

First name:

Middle name:

Surname:

Date of birth:

Address:

Postcode:

Contact telephone number:

Email:

Special requirements

Does the attorney require printed communication in a different format?:

Yes: No:

Yes: No:

Format required?:

Attorney personal details (cont'd):

(POA 4)	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>
Date of birth:	<input type="text"/>	<input type="text"/>
Address:	<input type="text"/>	<input type="text"/>
Postcode:	<input type="text"/>	<input type="text"/>
Contact telephone number:	<input type="text"/>	<input type="text"/>
Email:	<input type="text"/>	<input type="text"/>

Special requirements

Does the attorney require printed communication in a different format?:

Yes: No: Yes: No:

Format required?:

(POA 5)	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>
Date of birth:	<input type="text"/>	<input type="text"/>
Address:	<input type="text"/>	<input type="text"/>
Postcode:	<input type="text"/>	<input type="text"/>
Contact telephone number:	<input type="text"/>	<input type="text"/>
Email:	<input type="text"/>	<input type="text"/>

Special requirements

Does the attorney require printed communication in a different format?:

Yes: No: Yes: No:

Format required?:

Attorney personal details (cont'd):

(POA 6)	<input type="text"/>	<input type="text"/>
First name:	<input type="text"/>	<input type="text"/>
Middle name:	<input type="text"/>	<input type="text"/>
Surname:	<input type="text"/>	<input type="text"/>
Date of birth:	<input type="text"/>	<input type="text"/>
Address:	<input type="text"/>	<input type="text"/>
Postcode:	<input type="text"/>	<input type="text"/>
Contact telephone number:	<input type="text"/>	<input type="text"/>
Email:	<input type="text"/>	<input type="text"/>

Special requirements

Does the attorney require printed communication in a different format?:

Yes: <input type="checkbox"/>	No: <input type="checkbox"/>	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
Format required?: <input type="text"/>		Format required?: <input type="text"/>	

Other occupants:

First Name:	Surname:	Date of birth:	Relationship:
<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"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Employment status:

Job title:

Nature of business:

Occupation:

Company name:

Company address:

Company postcode:

Company telephone number:

Employed from:

Employed to:

Full time?: Yes: No:

Does the applicant own more than a 20% share?: Yes: No:

Is employment permanent?: Yes: No:

Is applicant still within probationary period?: Yes: No:

Is the applicant employed by a family member?: Yes: No:

Yes: No:

Yes: No:

Yes: No:

Yes: No:

Yes: No:

If the applicant is on a fixed-term contract

Has the contract previously been renewed?: Yes: No:

Will current contract be renewed?: Yes: No:

Yes: No:

Yes: No:

Gross basic annual salary: £

Car allowance: £

Other allowances: £

Commisison: £

Overtime: £

Bonus: £

Gross basic annual salary: £

Car allowance: £

Other allowances: £

Commisison: £

Overtime: £

Bonus: £

Does the applicant have any deductions from salary?: Yes: No:

Monthly amount: £

Source:

Yes: No:

£

SELF EMPLOYED OR DIRECTORS WITH MORE THAN 20% SHAREHOLDING

Employment status:

Ownership type:

Name of business:

Address of business:

Postcode:

Nature of business:

Occupation:

Full time?: Yes: No: Yes: No:

Earnings from latest return: £ £

Year ending:

Earnings from previous return: £ £

Year ending:

Percentage of business owned:

Number of partners:

Is all of the income from this employment derived from Buy to Let?: Yes: No: Yes: No:

Date commenced trading:

Is there an accountant used to prepare accounts?: Yes: No: Yes: No:

Accountants company name:

Qualifications:

Accountant's name:

Address:

Postcode:

How long have the accountants acted for the applicant?: Years: Months: Years: Months:

Other income sources**Applicant 1****Applicant 2**

Description of other source of income:

Annual amount of other income:

£

Annual amount of other income:

£

Description of other source of income:

Annual amount of other income:

£

Annual amount of other income:

£

Description of other source of income:

Annual amount of other income:

£

Annual amount of other income:

£

Description of other source of income:

Annual amount of other income:

£

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Annual amount of other income:

£

Annual amount of other income:

£

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Annual amount of other income:

£

Annual amount of other income:

£

Description of other source of income:

Annual amount of other income:

£

Annual amount of other income:

£

Other commitments

Commitment type:

Monthly payment: £

End date:

Repay on Completion?: Yes: No:

Source of funds for debt repayment:

£

Yes: No:

Other commitments

Commitment type:

Monthly payment: £

End date:

Repay on Completion?: Yes: No:

Source of funds for debt repayment:

£

Yes: No:

Other commitments

Commitment type:

Monthly payment: £

End date:

Repay on Completion?: Yes: No:

Source of funds for debt repayment:

£

Yes: No:

Other commitments

Commitment type:

Monthly payment: £

End date:

Repay on Completion?: Yes: No:

Source of funds for debt repayment:

£

Yes: No:

Other commitments

Commitment type:

Monthly payment: £

£

End date:

Repay on Completion?: Yes: No:

Yes: No:

Source of funds for debt repayment:

Other commitments

Commitment type:

Monthly payment: £

£

End date:

Repay on Completion?: Yes: No:

Yes: No:

Source of funds for debt repayment:

Other commitments

Commitment type:

Monthly payment: £

£

End date:

Repay on Completion?: Yes: No:

Yes: No:

Source of funds for debt repayment:

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Other mortgages or secured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
End date:	<input type="text"/>	<input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Unsecured loans

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Monthly payment:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Mail Order Accounts

Lender:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>

Credit or store cards

Card provider:	<input type="text"/>	<input type="text"/>
Outstanding balance:	£ <input type="text"/>	£ <input type="text"/>
Repay on Completion?:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Source of funds for debt repayment:	<input type="text"/>	<input type="text"/>