

Please confirm if this is associated to a 0% facility fee product

Yes

No

Intermediary details (customer facing)

Are you? Directly Authorised Appointed Representative Commercial Broker

Name Your customer reference

Address (including postcode)

Email address FCA registration number (if applicable)

Telephone number (including STD code) Confirm your NACFB membership number (if applicable)

Fax number (including STD code)

Please tick to confirm if you are part of a: Network Club Packager

Network/Club details (If you are an AR you must provide details of your network)

Packager details

Contact name

Contact name

Company name

Company name

Company address (including postcode)

Company address (including postcode)

Company telephone number (including STD code)

Company telephone number (including STD code)

FCA registration number (if applicable)

FCA registration number (if applicable)

Personal details - applicant/director 1

Personal details - applicant/director 2

To be completed for all enquiries, if there are more than 2 directors, please complete the 'Additional director details' form which can be found at precisemortgages.co.uk and attach with this form

Title (Mr/Mrs/Miss/Ms/Dr/Other)

Title (Mr/Mrs/Miss/Ms/Dr/Other)

If specified 'Other' please state

If specified 'Other' please state

First name

First name

Middle name(s)

Middle name(s)

Surname

Surname

D.O.B.

D.O.B.

Nationality

Nationality

Total eligible income £

Total eligible income £

Current residential mortgage debt £

Current residential mortgage debt £

Current estimated value £

Current estimated value £

Residential status

Residential status

Current address (Inc Postcode)

Current address (Inc Postcode)

Limited company details (only to be completed for a limited company)

Name of company

Company registration number

Number of directors

Business start date (DD/MM/YY)

Country of incorporation

Qualification criteria			
Have the applicant(s) had any adverse credit registered in the last 3 years? Yes <input type="checkbox"/> No <input type="checkbox"/>			
If yes, please provide additional details			
Application type (Regulated Mortgage Contracts available to individuals only)		Personal <input type="checkbox"/>	Limited company <input type="checkbox"/>
Is this application a Regulated Mortgage Contract?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Level of advice (Regulated Mortgage Contracts must always be advised)	Advised <input type="checkbox"/> Non-advised <input type="checkbox"/>
Does your customer wish to add any of the following fees to the loan (they should make a positive choice to do this)?			
Telegraphic transfer fee	Yes <input type="checkbox"/> No <input type="checkbox"/>	Facility fee	Yes <input type="checkbox"/> No <input type="checkbox"/>
Assessment fee	Yes <input type="checkbox"/> No <input type="checkbox"/>		
Do you intend to pass any of the procurement fee to the applicant(s)? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, how much £			
Are you charging the applicant(s) an administration fee?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much £	When is this payable?
Is this fee refundable?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much is refundable? £	When is this refundable?
Are you charging the applicant(s) a broker fee?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much £	When is this payable?
Is this fee refundable?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much is refundable? £	When is this refundable?
Are you charging the applicant(s) a packager fee?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much £	When is this payable?
Is this fee refundable?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much is refundable? £	When is this refundable?

Loan information			
Type of Security	First charge <input type="checkbox"/> Second charge <input type="checkbox"/>		
If a second charge, what is the current first charge balance £			
Is, or will, the property be let?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
Does any applicant or an "immediate family member" live in or intend to live in the property?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
Is the loan wholly or predominantly for the purposes of a business carried on, or intended to be carried on, by all of the applicants?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
Has any applicant or "immediate family member" ever lived in the property or did any applicant inherit it?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
Do any of the applicants currently own buy to lets other than the property or any additional security?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
If yes, total number of Buy to Let mortgaged properties owned by the applicants (excluding properties on any new Precise Mortgages applications).			
If there is an additional security, do any applicants or an "immediate family member" live in or intend to live in the additional security?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
If there is an additional security, has any applicant or an "immediate family member" ever lived in the additional security or did any applicant inherit it?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>
Is, or will any additional security be let?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	N/A <input type="checkbox"/>

Loan Requirements			
Scheme	Standard bridging <input type="checkbox"/>	Light refurbishment <input type="checkbox"/>	Heavy refurbishment <input type="checkbox"/>
Reason for loan			
Repayment type (Regulated Mortgage Contracts must be retained interest)	Monthly payments <input type="checkbox"/>	Retained interest <input type="checkbox"/>	
Loan type	Purchase <input type="checkbox"/>	Refinance <input type="checkbox"/>	

Total purchase price/estimated value £	Total open market value £	
If purchase price is less than the open market value, please explain the reason		
Total advance required (exclusive of fees/retained interest payments) £		
Term in months (12 months max for Regulated Mortgage Contracts)		
Will any additional security be available?	Yes <input type="checkbox"/>	No <input type="checkbox"/> If yes, what is the available equity
Type of conveyancing	Joint representation <input type="checkbox"/> <small>Where our conveyancer acts for both us and you (England and Wales only).</small>	Separate representation <input type="checkbox"/> <small>Where our conveyancer acts for us only and you have your own conveyancer.</small>

Exit strategy - please tick all that apply		
Sale <input type="checkbox"/>	Refinance <input type="checkbox"/>	Maturity of endowment plan <input type="checkbox"/>
Maturity of pension plan <input type="checkbox"/>	Maturity of savings plan <input type="checkbox"/>	Other <input type="checkbox"/>
Please provide full details (continue on 'Additional information' page if required.)		

Security details For more than one property, please add to additional information section		
Property address (Inc Postcode)		
Type (e.g. house, terraced house etc)	Property's current use	
Number of storeys (flats only)	Floor number (flats only)	Number of bedrooms
Tenure	Remaining term of lease (where applicable)	
Multi-Unit	Yes <input type="checkbox"/>	No <input type="checkbox"/> Number of Units
Holiday Let	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If the property is a Holiday Let, please provide the URL link to the property advertisement.		

Broker declaration

By submitting this request for a Decision in Principle to you, I :

- ▶ Note that you may use information that you may already hold about the Applicants (including Guarantors) in assessing this application including details about other properties which are mortgaged to you where they are the borrower or guarantor. I am aware, have made the Applicants aware and they agree that as part of this application you may provide to me, on their behalf, details of those properties to confirm that the information you hold about those is complete and accurate.
- ▶ Confirm that, if I send this form to you by email or have requested that you provide me with information by email I have made the Applicants aware of this, that email is not a secure medium and the content may be intercepted before it reaches the intended recipient.
- ▶ Agree to your Short Term Lending Terms of Business (2016 Edition) on my and the Firms behalf. (The terms of business can be accessed from pdf.precisemortgages.co.uk/01542_scl_terms_of_business.pdf)

Credit Decisions and Fraud Prevention Agencies

Note that:

- ▶ The personal information you collect from me will be shared with fraud prevention agencies who will use it to prevent fraud and money-laundering and to verify the identity of the applicant and any guarantor (Applicants). If fraud is detected, I or the Applicants could be refused certain services, finance or employment. Further details of how my and their information will be used by you and these fraud prevention agencies, and my and their data protection rights, can be found by contacting the Data Protection Officer at Precise Mortgages.
- ▶ You will also supply Applicant's personal information to credit reference agencies (CRAs) in order to process their application and they will give you information about Applicants, such as about their financial history. You do this to assess creditworthiness and product suitability, check their identity, manage their account, trace and recover debts and prevent criminal activity.
- ▶ You will also continue to exchange information about Applicants with CRAs on an ongoing basis, including about their settled accounts and any debts not fully repaid on time. CRAs will share their information with other organisations. Their data will also be linked to the data of their spouse, any joint applicants or other financial associates.
- ▶ The identities of the CRAs, and the ways in which they use and share personal information, are explained in more detail at www.equifax.co.uk/crain, www.experian.co.uk/crain or www.callcredit.co.uk/crain.
- ▶ The details entered must be accurate and true to the best of my knowledge. If you suspect my or the Applicant's involvement in fraudulent activity you will take appropriate action against me and/or the Applicant.

Privacy Notice - Customer

- ▶ Note that how you, credit reference and fraud prevention agencies use customer information, is set out in more detail in your [Summary Privacy Notice](#). You are providing this to me as the Applicant(s) representative and in order to allow you to lawfully progress their application, you require confirmation that I, as the Applicant(s) representative, have provided a copy of the Summary Privacy Notice to each of the Applicants, before you can lawfully proceed with their application.
- ▶ Confirm that I have provided each Applicant with a copy of the Summary Privacy Notice.

Privacy Notice - Intermediary

Note that:

- ▶ More information about how you and fraud prevention agencies use information you hold about mortgage intermediaries is contained in your Intermediary [Privacy Notice](#).
- ▶ You may contact me about products and services offered by Precise Mortgages by post, electronic mail, telephone, SMS text messaging and any other online or interactive media. If you do not wish to receive these then please send an email to marketing@precisemortgages.co.uk with the subject line of 'Unsubscribe' from the above email address.

Signed	Date
	Print name

Get in touch with our intermediary support team

Freephone: 0800 116 4385

Email: bridging@precisemortgages.co.uk

Website: www.precisemortgages.co.uk

We can provide literature in large print, Braille and audio tape. Please ask us for this leaflet in an alternative format if you need it.

Additional information



Broker name	
Applicant(s) name	

Please add any additional security details here.

Security	To be lived in	To be let

If you need to enter any additional information to support this case please enter it here.

Question	Details