

# Your Mortgage Application Form

## For Intermediary Business

If your application is for a Decision In Principle only, please complete 'Part 1' only. If your application is to request a Full Mortgage Application, please complete both Parts 1 & 2.

(For remortgage or mortgage free applications, please use remortgage form M1IR)

You can order all our publications in large print, Braille, audio cassette or CD. Your local branch will arrange this for you or you can contact us on **0800 30 20 11**.

If you have hearing or speech difficulties and are a textphone user, you can call us direct in text on **0800 37 80 01**. We also accept calls via BT Type Talk. Just dial **18001** followed by the full telephone number you wish to ring.

### Mortgage application supporting documentation checklist

If you have previously been provided with a Decision in Principle for this mortgage, please enclose the evidence requested with this mortgage application. Otherwise, please provide the following information listed below, failure to supply this evidence **will result in the application being returned upon receipt**.

#### Reason for submission

Reason For Paper Application

**(Reason for submitting a paper application must be complete)**

Technical issue that has resulted in the case having to be submitted via paper

Ticket number (must be supplied)

#### Identification - UK and European Economic Area Nationals

##### Evidence We Can Accept

Name

Please supply one document from the UK Photo ID list below:

- Valid passport
- Valid UK or Northern Ireland full photo card driving licence

If you don't have either of the above, please supply one document from the proof of name list below and one **different** document from the proof of current address list.

- UK based Bank or Building Society statement (less than three months old, internet banking statements/ Nationwide Flex Account statements/Cheshire, Derbyshire and Dunfermline building societies statements are not acceptable)
- HM Revenue and Customs notice of coding (less than twelve months old)
- UK Firearms Licence or Shotgun Certificate
- Benefit Letter (less than twelve months old)
- Valid UK or Northern Ireland old style paper/provisional photo driving licence
- Valid National ID cards issued by European Union member states

Address

Acceptable proofs of current address:

- Mortgage statement (excluding Nationwide, Cheshire, Derbyshire and Dunfermline building societies)
- UK based bank, building society or credit card statement (complete full month required, less than three months old, internet banking statements/Nationwide Flex Account statements/Cheshire, Derbyshire and Dunfermline building societies statements are not acceptable).
- Valid UK or Northern Ireland old style paper/provisional photo driving licence
- HMRC notice of tax coding (less than 12 months old)
- Gas, electricity or telephone bill, not mobile (less than 3 months old, internet statements are not acceptable)
- Any benefit letter from a government organisation (less than 12 months old)
- Local authority housing benefit letter (less than 12 months old)

#### Acceptable proofs of UK Residency for non-EEA Foreign Nationals (with indefinite leave to remain in the UK)

Evidence We Can Accept

Please provide the following documents:

- Copy of a valid non-UK or European Economic Area (Non-EEA) passport
- Acceptable proofs of 'indefinite leave to remain in the UK'
- Passport containing stamp for indefinite leave to remain in the UK or
- Copy of visa/residency permit (front and back for new biometric formats) or
- Written confirmation of indefinite leave to remain in the UK from the Home Office

One additional acceptable proof of current address as detailed in the UK/EEA address proof section above.

**Please also complete the information in section 18.**

For **Acceptable proofs of UK Residency for non-EEA Foreign Nationals (Without Indefinite leave to remain in the UK)**, please visit [nationwide-intermediary.co.uk](http://nationwide-intermediary.co.uk) for more information.

## Income - Permanent employment proofs

### Evidence We Can Accept

Non-variable basic salary	<p>Please provide:</p> <p>The most recent payslip. <input type="checkbox"/></p> <p>It must be the full payslip, including any detachable parts. Please view the payslip example on the website for further information.</p>
Variable basic salary	<p>(If the applicant does not receive the same basic salary and there is no annualised figure on the current payslip)</p> <p>Use the below bonus, overtime &amp; commission section to work out the number of payslips required based on the frequency of the salary. <input type="checkbox"/></p> <p>Please provide:</p> <p>The most recent payslip.</p> <p>Where the applicant wishes to declare any of the following please circle which ones they wish to include.</p> <p>Car allowance/Location allowance/Mortgage subsidies/Shift allowance/Teaching &amp; responsibility payment (TLR) 1 &amp; 2/ Value account/Pension benefit fund/Special Educational Needs.</p>
Bonus, overtime & commission	<p>Based on the frequency, please provide:</p> <p>Paid weekly - last 8 consecutive payslips <input type="checkbox"/></p> <p>Paid fortnightly - last 6 consecutive fortnightly payslips <input type="checkbox"/></p> <p>Paid 4 weekly or monthly - last 3 consecutive payslips <input type="checkbox"/></p> <p>Paid quarterly bonus &amp; commission - last 3 consecutive quarterly payslips or award letters/statements from the current employer that show payment (the oldest cannot be more than 12 months old) <input type="checkbox"/></p> <p>Paid half yearly bonus &amp; commission - last 4 consecutive half yearly payslips or award letters/statements from the current employer showing payment (the oldest cannot be more than 25 months old and at least 3 of the 4 must show receipt of a bonus or commission) <input type="checkbox"/></p> <p>Annual bonus &amp; commission - last 2 consecutive annual payslips or award letters/statements from the current employer showing payment (the oldest cannot be more than 25 months old and both must show receipt of a bonus or commission) <input type="checkbox"/></p>

## Income - Self-employment proofs

### Evidence We Can Accept

For applicants with an accountant	<p>Please provide:</p> <p>Accountant's name, address, contact telephone number and email address <input type="checkbox"/></p> <p>We will then request an accountant's certificate directly from your accountant.</p>
For applicants who self-assess and submit their tax returns online to HMRC	<p>Please provide:</p> <p>The latest two years' tax calculations accompanied by corresponding HMRC tax year overviews. <input type="checkbox"/></p>
For your applicants who self-assess and submit paper based tax returns to HMRC	<p>Please provide:</p> <p>The latest two years' tax calculations (HMRC will automatically send a paper copy of the tax calculation to your applicant after the tax return has been processed by HMRC). <input type="checkbox"/></p>

## Other income

### Evidence We Can Accept

Child benefit	<p>Please provide:</p> <p>Latest award notice (all pages and dated within the last 12 months) <input type="checkbox"/></p> <p>OR</p> <p>Latest bank statement showing credit of child benefit <input type="checkbox"/></p>
Working and/or child tax credits	<p>Please provide:</p> <p>Most recent 'full' or 'amended' award notice for the current tax year (all pages) <input type="checkbox"/></p> <p><b>We only accept this income if all customers named on the mortgage are the same as all named on the award notice. The income used is the lowest figure for each kind of tax credit.</b></p>
Maintenance	<p>Please provide:</p> <p>A copy of the maintenance agreement, received under a Court Order <input type="checkbox"/></p> <p>OR</p> <p>CSA assessment <input type="checkbox"/></p> <p>OR</p> <p>A written private agreement drawn up between the separating parties <input type="checkbox"/></p> <p>AND</p> <p>3 months' bank statements as evidence of payment <input type="checkbox"/></p>

Benefits specifically for the disabled The below benefits paid because of a disability are an acceptable source of income, provided the applicant can provide their current award letter:  
Please circle which are applicable  
Incapacity benefit/Employment & support allowance (ESA - Support group only/  
Disability living allowance (DLA) for a person aged 16 or over/Reduced earning allowance (REA)/  
Attendance allowance/Personal independence payment (PIP)/Industrial injuries disablement benefit/  
War disablement pension/Armed forces compensation scheme/Disablement living allowance on behalf of a child under 16,  
Carers/Attendance allowance, Pension credit, Widowed parents allowance, Armed forces independence payment

State retirement pension Please provide:  
Latest annual statement of pension

Private pension Please supply **one** of the following:  
Latest annual statement of pension/due on retirement   
Latest payslip from the pension provider   
Latest letter from the pension provider   
Latest P60 from the pension provider

## Past payment history

### Evidence We Can Accept

Property that has a mortgage Where there are 2 or more existing mortgages please provide the following:  
The last annual mortgage statement (covering 12 months' payments)   
Where a mortgage statement covers less than 6 months' payments and is over 6 months old,  
the last 3 months bank statements are required which show the mortgage payment being made   
Where the above is unavailable an existing lender's reference is required (Nationwide will request directly)

## Deposit

### Evidence We Can Accept

UK based personal savings/  
bank accounts Please provide:  
One full month's bank statement dated within the last three months

Foreign based personal  
savings/bank accounts Please provide:  
For accounts in an **EEA Country**: most recent **three** months' bank statements   
For accounts **outside the EEA**: most recent **six** months' bank statements

Gifts Please provide:  
A completed gift template if the gift is for £10,000 or more

Inheritance Please provide:  
A letter from the executor or solicitor for the estate

For alternative acceptable sources of deposit please visit [www.nationwide-intermediary.co.uk](http://www.nationwide-intermediary.co.uk), give details of deposit

## Bank Statement

### Evidence We Can Accept

UK based bank/building  
society statement Please provide:  
Latest one full month salary fed statement

For more detail on policies and evidence requirement please visit [www.nationwide-intermediary.co.uk](http://www.nationwide-intermediary.co.uk)

**We may require more evidence once the case has been received and assessed. If this is the case we will contact you with what is needed.**



## Company name and address

Company name

Property number and/or name

Street

Town

Postcode

Should we need to make contact in relation to this case (enter packaging/admin centre number if applicable)

Telephone number (inc STD)

Fax number (inc STD)

## Network / Mortgage Club / Company / Branch Agency

To ensure this application is processed under the correct route please state the name of the Network/Mortgage Club/Company/Branch Agency Principal that you wish this application to be processed under

Please affix appropriate sticker here

Intermediary/agent code

Name of usual mortgage centre or branch

### For Mortgage Application Tracking Service (MATS)

Mobile telephone number

Email address

Please supply your website/MTE user ID (if applicable)

Please tick if this application has already been scored via:

MTE ?

Reference number

a branch or mortgage centre ?

Reference number

## Declaration

I confirm that all documents provided, whether electronically attached or posted, are genuine copies or photographic images of the original documents that have been seen by me and (where appropriate) my client(s) have authorised me to take and provide you with photographic images of the documents provided.

Intermediary's name

Company FCA number

If you are an Appointed Representative this is not your Principal's FCA name or number

Level of advice (please confirm)

Advised

We may use text messaging to update you on the progress of your client's application. If you prefer not to receive updates in this way, please tick this box

### Signature

Please sign within white box

Date

Nationwide reserves the right to return this case if the correct fees are not included, signatures are missing, and/or the application is not fully completed.

# 1. Personal information

	First Applicant	Second Applicant
Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input style="width: 100px;" type="text"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input style="width: 100px;" type="text"/>
Please enter ALL forenames	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Surname	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Date of birth	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
	Gender (please tick) <input type="checkbox"/> M <input type="checkbox"/> F	Gender (please tick) <input type="checkbox"/> M <input type="checkbox"/> F
<b>If you have been known by a different name in the last three years, please state previous name, date and method of change</b>		
Previous title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input style="width: 100px;" type="text"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input style="width: 100px;" type="text"/>
Forename	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Surname	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Date and method of change	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
Marital status	Deed Poll <input type="checkbox"/> Marriage/Civil partnership* <input type="checkbox"/> Divorce/Dissolved civil partnership* <input type="checkbox"/> Single <input type="checkbox"/> Engaged <input type="checkbox"/> Married/Civil partnership* <input type="checkbox"/> Separated <input type="checkbox"/> Divorced/Dissolved civil partnership* <input type="checkbox"/> Widowed <input type="checkbox"/>	Deed Poll <input type="checkbox"/> Marriage/Civil partnership* <input type="checkbox"/> Divorce/Dissolved civil partnership* <input type="checkbox"/> Single <input type="checkbox"/> Engaged <input type="checkbox"/> Married/Civil partnership* <input type="checkbox"/> Separated <input type="checkbox"/> Divorced/Dissolved civil partnership* <input type="checkbox"/> Widowed <input type="checkbox"/>
* Civil partnerships are couples registered under the Civil Partnership Act 2004		
<b>Dependant Details</b>	<b>First Applicant</b>	<b>Second Applicant</b>
How many financial dependants do you have in the following age groups?	Under 6 years <input style="width: 20px; height: 20px;" type="text"/>	Under 6 years <input style="width: 20px; height: 20px;" type="text"/>
	6 to 11 years <input style="width: 20px; height: 20px;" type="text"/>	6 to 11 years <input style="width: 20px; height: 20px;" type="text"/>
	12 to 17 years <input style="width: 20px; height: 20px;" type="text"/>	12 to 17 years <input style="width: 20px; height: 20px;" type="text"/>
	18 years and above <input style="width: 20px; height: 20px;" type="text"/>	18 years and above <input style="width: 20px; height: 20px;" type="text"/>
At what age do you plan to retire?	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
Nationality (required for regulatory reasons)	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<b>If you are a non-EEA national, please complete the relevant additional information section</b>		
Are you or will you be resident in the UK for tax purposes when the mortgage has completed?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Telephone numbers: Home (incl STD code)	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Work (incl STD code)	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Mobile telephone number	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Email address	<input style="width: 100%; height: 20px;" type="text"/>	
Do you regularly smoke cigarettes or cigars, or use tobacco replacement products?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

## 2. Property to be mortgaged

Address of property


Postcode

Property description

House  Bungalow  Purpose built flat  Maisonette  Converted flat  Converted maisonette

Property type

Detached  Semi detached  Terraced  Other (inc. Flats)  If the property is a flat, how many floors does the building have?  Floor number of Flat  Is there a lift? Yes  No

Number of bedrooms

Who should the valuer contact to gain access to the property?

Telephone (incl STD code)

If the security property is located in Scotland please provide details of who carried out the Home Report

Contact name


Postcode

Contact telephone number

Date the report was carried out

Name, address and telephone number of the Estate Agent selling the property or the vendor if a private sale

Contact name


Postcode

Telephone if different from above

Tenure

Freehold  Feuhold  Leasehold  Other

If leasehold please state

Unexpired term  years

New properties and properties less than 2 years old

Is it NHBC or Foundation 15 registered, or covered by a Zurich Municipal Building Guarantee? Yes  No

If No, is it being supervised by, or was it supervised by a qualified architect? Please give name and address of architect.


Postcode

Construction type (if known)

Standard (e.g brick walled/tiled roof)  Other (please specify)

**If other use Additional Information section at the end of this form if necessary**

Year built

Is the property a new build, newly converted, refurbished?

Yes  No

How many acres of land does the property have (if more than one)?

Is the property subject to any agricultural restrictions and/or will the land be used for agricultural or business purposes? Yes  No

**If Yes, please provide details in the Additional Information section at the end of this form**

Will you personally use the whole property for residential use?

Yes  No  If No, please state the proportion of the property to be used for non residential purpose and exactly what that use will be.

### 3. Your 3 year UK address history

	First Applicant	Second Applicant
<b>Present Permanent Address</b> Property number and/or name	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
When did you start living there?	<input type="text"/>	<input type="text"/>
Present occupancy status e.g. Owner Occupier/Council or Private Tenant/Living with relatives/etc	<input type="text"/>	<input type="text"/>
Please state any previous address(es) in the last three years	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Date moved in	<input type="text"/>	<input type="text"/>
Occupancy status for previous address	<input type="text"/>	<input type="text"/>

Please continue on the Additional Information section at the end of this form if necessary

### 4. Your employment and income details

Please ensure that all applicants are not intending to use any income which is received in a foreign currency to support their mortgage application.

	First Applicant	Second Applicant
<b>1. Main Employment</b>		
How are you employed?	<input type="checkbox"/> Employed <input type="checkbox"/> Self Employed (Partner) <input type="checkbox"/> Self Employed (Sole Trader) <input type="checkbox"/> Director/Shareholder with 20% or less shareholding <input type="checkbox"/> Director/Shareholder with more than 20% shareholding <input type="checkbox"/> Unemployed <input type="checkbox"/> Homemaker <input type="checkbox"/> Retired	<input type="checkbox"/> Employed <input type="checkbox"/> Self Employed (Partner) <input type="checkbox"/> Self Employed (Sole Trader) <input type="checkbox"/> Director/Shareholder with 20% or less shareholding <input type="checkbox"/> Director/Shareholder with more than 20% shareholding <input type="checkbox"/> Unemployed <input type="checkbox"/> Homemaker <input type="checkbox"/> Retired
What is your employment type?	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary <input type="checkbox"/> Fixed Term Contract <input type="checkbox"/> Sub-Contractor Fixed Term <input type="checkbox"/> Sub-Contractor Open Ended	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary <input type="checkbox"/> Fixed Term Contract <input type="checkbox"/> Sub-Contractor Fixed Term <input type="checkbox"/> Sub-Contractor Open Ended
What is your specific occupation/ job title?	<input type="text"/>	<input type="text"/>
Name and address of employer/ self employed business address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Telephone (incl STD code)	<input type="text"/>	<input type="text"/>
Is this the correct address to write to for a reference?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Length of service with your current employer or self-employed trading	<input type="text"/>	<input type="text"/>

If No, please put the correct address in Additional Information section at the end of this form



## 4. Your employment and income details

### Contracting Applicants

How long have you been contracting? (for fixed term only)

How long is remaining in your contract? (for fixed term only)

If you are a sub-contractor, are you employed for tax purposes?

Yes  No

### Income Details

Note: W = Weekly, 4W = Four Weekly, M = Monthly, Q = Quarterly and A = Annually

Gross Salary (before tax & national insurance)

£       per annum

Frequency of payment

£       per

Bonus

£       per

Overtime

£       per

Commission

£       per

If you are self employed, please enter amount and share of net profit/income

£       latest year   %

£       previous year   %

or if you are a Director/Shareholder of a Ltd Co and have greater than 20% shareholding, please provide annual salary/dividend

£       latest year

£       previous year

Name, address and telephone number of accountant


Postcode

Telephone (incl STD code)

### Second Applicant

Yes  No

£       per annum

Frequency of payment

£       per

Bonus

£       per

Overtime

£       per

Commission

£       latest year   %

£       previous year   %

£       latest year

£       previous year

Please make sure that the amount entered in these boxes matches the evidence you provide to support the request.


Postcode

Postcode

### 2. Previous Employment Details

What was your specific occupation/job title?


Start date:

End date:

How were you employed?

- Employed
- Self Employed (Partner)
- Self Employed (Sole Trader)
- Director/Shareholder with 20% or less shareholding
- Director/Shareholder with more than 20% shareholding

- Employed
- Self Employed (Partner)
- Self Employed (Sole Trader)
- Director/Shareholder with 20% or less shareholding
- Director/Shareholder with more than 20% shareholding

Annual gross salary? £

Annual gross salary? £

## 4. Your employment and income details (continued)

### 3. Second Employment

How are you employed?

Please complete this section only if you have a second job

Employed   
 Self Employed (Partner)   
 Self Employed (Sole Trader)   
 Director/Shareholder with 20% or less shareholding   
 Director/Shareholder with more than 20% shareholding

Employed   
 Self Employed (Partner)   
 Self Employed (Sole Trader)   
 Director/Shareholder with 20% or less shareholding   
 Director/Shareholder with more than 20% shareholding

What is your employment type?

Permanent   
 Temporary   
 Fixed Term Contract   
 Sub-Contractor Fixed Term   
 Sub-Contractor Open Ended

Permanent   
 Temporary   
 Fixed Term Contract   
 Sub-Contractor Fixed Term   
 Sub-Contractor Open Ended

What is your specific occupation/  
 job title?



Length of service with your  
 current employer or  
 self-employed trading



Name and address of employer/  
 self-employed business address





Postcode

Postcode

Telephone (incl STD code)



Is this the correct address to  
 write to for a reference?

Yes  No

Yes  No

If No, please put the correct address in Additional Information section at the end of this form.

### Contracting Applicants

How long have you been  
 contracting?



How long is remaining on your  
 current contract?



If you are a sub-contractor, are  
 you employed for tax purposes?

Yes  No

Yes  No

### Income Details

Note: W = Weekly, 4W = Four Weekly, M = Monthly, Q = Quarterly and A = Annually

Gross Salary (before tax &  
 national insurance)

£         per annum

Frequency of payment

£         per annum

Frequency of payment

Bonus

£         per

W 4W M Q A

£         per

W 4W M Q A

Overtime

£         per

W 4W M Q A

£         per

W 4W M Q A

Commission

£         per

W 4W M Q A

£         per

W 4W M Q A

If you are self employed, amount  
 and share of net profit/income

£         latest year    %

£         latest year    %

£         previous year    %

£         previous year    %

or if you are a Director/  
 Shareholder of a Limited  
 Company with greater than  
 20% shareholding, please  
 provide annual salary/dividend

£         latest year

£         latest year

£         previous year

£         previous year

Name, address and telephone  
 number of accountant





Postcode

Postcode

Telephone (incl STD code)

## 5. Other income details

Please ensure that all applicants are not intending to use any income which is received in a foreign currency to support their mortgage application.

	First Applicant	Second Applicant
Investment income	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Maintenance income	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Rental income from an unencumbered property	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Pension income	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Pension credits	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Child benefit	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
State disability benefit	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month
Universal credit/Tax credits	£ £ £ £ £ p p per month	£ £ £ £ £ p p per month

## 6. Anticipated retirement income

Nationwide will use your declared retirement age to determine whether you will be borrowing into retirement. If you are within 10 years of this date and will be borrowing into retirement please complete the following anticipated income details.

Please ensure that all applicants are not intending to use any income which is received in a foreign currency to support their mortgage application.

	First Applicant	Second Applicant
Annual investment income (including dividends)	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual maintenance income	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual rental from a mortgage free property	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual pension income (including annuities)	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual pension credit	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual child benefit	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual state disability benefit	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Annual universal credit/tax credit	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Dividend income from an applicant that owns a share in a business	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Dividend income from a portfolio of shares	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum
Income from a company the applicant owns that will continue to provide an income into retirement	£ £ £ £ £ £ £ per annum	£ £ £ £ £ £ £ per annum

## 7. Monthly outgoings details

	First Applicant	Second Applicant
Current account details: Bank/Building Society name and address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Sort code and account number	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Account holder(s) name(s)	<input type="text"/>	<input type="text"/>

## 7. Monthly outgoings details (continued)

	First Applicant	Second Applicant
How long have you held this account?	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M	<input type="text"/> Y <input type="text"/> Y <input type="text"/> M <input type="text"/> M
Total monthly childcare expenditure	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on school fees	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on CSA and/or maintenance	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Additional monthly expenditure to financial dependants	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly travel expenditure	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any personal loan/hire purchase with more than six months to run	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any Deferred Purchase Agreements with more than six months to run (Deferred Purchase Agreements are buy now, pay later contracts that you have in place)	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any secured loans with more than six months to run	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any student loans	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total outstanding credit card balance	£ <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"/> £
Do you have any other regular outgoings, other than basic living expenses, that you have not already provided and that you would not want to give up, in order to pay your mortgage payments?	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month

**For any additional expenditure, please complete the details in the Additional Information section at the end of this form if necessary.**

## 7a. Monthly outgoings details

Total monthly expenditure on any personal loan/hire purchase that is being cleared on or before completion	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any Deferred Purchase Agreements that are being cleared on or before completion (Deferred Purchase Agreements are buy now, pay later contracts that you have in place)	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any secured loans that are being cleared on or before completion	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total monthly expenditure on any student loans that are being cleared on or before completion	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per month
Total outstanding credit card balance that is being cleared on or before completion	£ <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"/> £

## 8. Property outgoings details

Please enter your annual payments for:	
Council tax	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per annum
Ground rent	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per annum
Service charge(s)	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per annum
Buildings insurance	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per annum
Shared Ownership rent amount	£ <input type="text"/> £ <input type="text"/> £ <input type="text"/> £ <input type="text"/> p <input type="text"/> p per annum

## 8. Property outgoings details (continued)

### Re-mortgage to TMW

Only complete this section if you are mortgaging a new property with Nationwide and re-mortgaging your current property to TMW

TMW account number or DIP reference

Loan amount

£

Anticipated rental income

£

Monthly mortgage amount

£

Term (years)

### Current Mortgage Details

#### First Applicant

##### Mortgage 1

Total outstanding balance

£

Total interest only amount

£

Term remaining

Do you let any of these properties?

Yes  No

If yes, do you have a tenancy agreement in place for any of the properties you let?

Yes  No

Total monthly mortgage payment

£

Total monthly rental income

£

Will you remain on the mortgage after completion of this mortgage?

Yes  No

If Yes, please specify the mortgage balance that will be continuing:

£

If No, please complete the relevant additional information section.

##### Mortgage 2

Total outstanding balance

£

Total interest only amount

£

Term remaining

Do you let any of these properties?

Yes  No

If yes, do you have a tenancy agreement in place for any of the properties you let?

Yes  No

Total monthly mortgage payment

£

Total monthly rental income

£

Will you remain on the mortgage after completion of this mortgage?

Yes  No

If Yes, please specify the mortgage balance that will be continuing:

£

##### Mortgage 3

Total outstanding balance

£

Total interest only amount

£

Term remaining

Do you let any of these properties?

Yes  No

If yes, do you have a tenancy agreement in place for any of the properties you let?

Yes  No

Total monthly mortgage payment

£

Total monthly rental income

£

Will you remain on the mortgage after completion of this mortgage?

Yes  No

If Yes, please specify the mortgage balance that will be continuing:

£

### Current Mortgage Details

#### Second Applicant

##### Mortgage 1

Total outstanding balance

£

Total interest only amount

£

Term remaining

Do you let any of these properties?

Yes  No

If yes, do you have a tenancy agreement in place for any of the properties you let?

Yes  No

Total monthly mortgage payment

£

Total monthly rental income

£

Will you remain on the mortgage after completion of this mortgage?

Yes  No

If Yes, please specify the mortgage balance that will be continuing:

£

If No, please complete the relevant additional information section.

##### Mortgage 2

Total outstanding balance

£

Total interest only amount

£

Term remaining

Do you let any of these properties?

Yes  No

If yes, do you have a tenancy agreement in place for any of the properties you let?

Yes  No

Total monthly mortgage payment

£

Total monthly rental income

£

Will you remain on the mortgage after completion of this mortgage?

Yes  No

If Yes, please specify the mortgage balance that will be continuing:

£

##### Mortgage 3

Total outstanding balance

£

Total interest only amount

£

Term remaining

Do you let any of these properties?

Yes  No

If yes, do you have a tenancy agreement in place for any of the properties you let?

Yes  No

Total monthly mortgage payment

£

Total monthly rental income

£

Will you remain on the mortgage after completion of this mortgage?

Yes  No

If Yes, please specify the mortgage balance that will be continuing:

£

## 9. Future changes to circumstances

Do you know of any reductions to your income during the term of the mortgage?

## 10. Your credit history

Have you been declared bankrupt or entered into a voluntary arrangement with a creditor in the last 6 years?

**First Applicant**

Yes  No

**Second Applicant**

Yes  No

Have you ever had a county court judgment against you?

Yes  No

Yes  No

Have you ever had a property repossessed?

Yes  No

Yes  No

## 11. Your mortgage requirements

### Reason for Mortgage

What is the purpose of the mortgage?

- Purchase of main residence
- Purchase a holiday home in the UK
- Purchase a home for a dependant relative
- Purchase a second property due to work location

What is your current mortgage status?

**First Applicant**

- First time buyer (i.e. have not held a mortgage in the last 3 years)
- Existing Nationwide borrower
- Existing borrower with another lender
- Previous Nationwide borrower
- Previous borrower with another lender

**Second Applicant**

- First time buyer (i.e. have not held a mortgage in the last 3 years)
- Existing Nationwide borrower
- Existing borrower with another lender
- Previous Nationwide borrower
- Previous borrower with another lender

Are you selling a property?

Yes  No

Yes  No

If yes, what is the property sale price?

£

£

Do you currently own a property that is mortgage free?

Yes  No

Yes  No

### Property Ownership Type

- |  |                           |   |
|--|---------------------------|---|
| Standard Purchase <input type="checkbox"/> | Purchase Price            | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
| Right to Buy <input type="checkbox"/>      | Discounted Purchase Price | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
|  | Full Market Value         | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
|  | Home Purchase             | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
|  | Home Improvement          | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
|  | Other purposes            | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
| Shared Ownership <input type="checkbox"/>  | Purchase Price of Share   | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
|  | Full Market Value         | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
| Equity Share <input type="checkbox"/>      | Purchase Price of Share   | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |
|  | Full Market Value         | £ <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> <input type="text" value="£"/> |

How much of the mortgage is for:

## 11. Your mortgage requirements (continued)

### First Applicant

What type of equity share scheme is it?

Who is the equity share holder?

What date does the equity share loan first become due for repayment?

Genuine Bargain Price  Purchase Price £

Full Market Value £

Restricted Resale Price  Purchase Price £

Full Market Value £

What is the maximum percentage of the market value that the property can be sold for?

### Second Applicant

What type of equity share scheme is it?

Who is the equity share holder?

What date does the equity share loan first become due for repayment?

Genuine Bargain Price  Purchase Price £

Full Market Value £

Restricted Resale Price  Purchase Price £

Full Market Value £

What is the maximum percentage of the market value that the property can be sold for?

Does this application relate to a Nationwide or external scheme?

Nationwide

External

Help to Buy Scheme code – other please state

What is the total amount you want to borrow?

£

Are you using any of this mortgage to repay pre existing debt?

Yes  No  If Yes, what is the total amount that you will be repaying? £

### Deposit Details

Please detail the source(s) of your mortgage deposit. The sum of deposit amounts must equal the difference between the amount you want to borrow and the Purchase Price.

#### Source of Deposit

#### Amount of Deposit from this Source

Savings £

Equity £

Gift £

Builders' cashback £

Vendor cashback £

#### Source of Deposit

#### Amount of Deposit from this Source

Other £

Total Deposit Amount £

## 12. Your porting requirements

Are you porting all or part of an existing mortgage with Nationwide?

Yes  No

Yes  No

If Yes, provide details of the mortgage account number, balance to port and required term.

#### Mortgage Account Number

Amount Being Ported £

Interest Only Amount £

Redemption Date

#### Mortgage Account Number

Amount Being Ported £

Interest Only Amount £

Redemption Date

## 12. Your porting requirements (continued)

Mortgage Account Number

Amount Being Ported

£

Interest Only Amount

£

Redemption Date

Mortgage Account Number

Amount Being Ported

£

Interest Only Amount

£

Redemption Date

Mortgage Account Number

Amount Being Ported

£

Interest Only Amount

£

Redemption Date

Mortgage Account Number

Amount Being Ported

£

Interest Only Amount

£

Redemption Date

All existing borrowing (i.e. the amount being ported) can be kept on the existing repayment type and if any part of it is on interest only you must have an acceptable repayment strategy(ies) in place. If any part of your existing borrowing is on interest only and you wish to transfer some or all of it onto a capital and interest repayment basis, when taking out the new loan, please confirm this in the additional details section of the form. All further borrowing must be taken on a capital and interest repayment basis.

If your existing borrowing (ie Porting) is investment backed, how do you intend to repay the capital element of the mortgage?

New ISA  New endowment policy  New pension plan  Existing ISA  Existing endowment policy   
Existing pension plan  Sale of second property  Sale of main residence

Estimated value of second property £

Are all persons named on this repayment strategy also applicants for this mortgage?

Yes  No  If repayment strategy is 'Sale of second property', please complete the 'Current mortgage details' section

If endowment/pension/ISA linked please list the policies to be used:

Policy provider           Policy start date        
Policy maturity date       Latest estimated maturity value £       Monthly cost £

Please continue on the Additional Information section at the end of this form if necessary

An offer cannot be issued on an interest only or part interest only basis without these details.  
Please provide details of any additional accounts to be ported in the Additional Information section.

If you are not porting or require additional borrowing to that being ported, please provide the following information:

Mortgage amount

£

The total of Ported Mortgage amount and non-Ported Mortgage amount must equal the total amount you want to borrow.

Mortgage term

Are you taking this mortgage over the minimum affordable term?

Yes  No

Type of mortgage required

If you would like a tracker or fixed rate mortgage you may have the option to take this product with or without a product fee.

Fixed rate Yes  No  with product fee  without product fee  Interest rate    % Fixed rate term   Yrs

Tracker rate Yes  No  with product fee  without product fee  Interest rate    % Tracker rate term   Yrs

Would you like a mortgage product that includes the cost of conveyancing?

Would you like a mortgage product that includes the cost of a valuation?



## 12. Your porting requirements (continued)

Product ID

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Dependent on your application type, a non-refundable booking fee may need to be paid upfront upon reservation.

Adding fees to the loan

You need to make the product fee payment upfront. If you don't make this payment upfront, the fee amount will be added to the loan amount and incur interest. By doing this there may also be an impact on the amount that can be borrowed. We reserve the right to request payment of the product fee upfront.

If applicable, do you wish to add this fee to your loan? Yes  No

Fixed and tracker mortgages can be withdrawn at short notice. If you've chosen a product with a product fee and you'd like to pay it upfront, we'll need to have received the non-refundable booking fee (if applicable), product fee and application before we can reserve the product for you. If you're adding the fee to the loan or there isn't a fee on the product you've chosen, we'll reserve the product for you once we've received the non-refundable booking fee (if applicable) and application. If you add the fees to the loan but don't complete the mortgage, we have the right to ask you to pay these.

How would you like to make your mortgage payments?

Direct Debit  Transfer from a Nationwide current account  Standing Order  Cash/Cheque

Payments by Direct Debit or Transfer from a Nationwide current account may be required for certain products. Where payments are made by Direct Debit or Transfer from a Nationwide current account, we will give you at least seven days' notice of any change in your payments.

Please give the names of anyone who is or will be 17 or over, who is living in the property but not on the mortgage (not Scotland).

Title	Forename	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

In England, Wales and Northern Ireland, all adults who will occupy the property at the time of the advance other than the borrowers will be required to sign the Society's Form of Consent to Mortgage.

If NONE please tick here

**If there are more than two, please write the name(s) of any other(s) in the Additional Information section at the end of this form.**

## 13. Use of my information



### Use of my information

I (each of us if more than one) agree that:

- any information about me and my account may be shared within Nationwide to open and manage the account, make lending decisions, collect debts, trace debtors, prevent fraud and money laundering and for business analysis. It may also be shared within Nationwide and with specialist companies for market research purposes on behalf of Nationwide. It may also be shared with other organisations for the purposes of them providing products and services in association with or on behalf of Nationwide. We will use the email address you have provided to contact you about your application and servicing your account; this may include sending you important legal documentation. Nationwide may use my information to populate application forms for products provided or introduced by Nationwide. If I notify you of changes to my personal details, it is your normal practice to update all of my accounts unless I ask you not to. If I have opened an account or policy with another organisation introduced or provided to me by Nationwide, I will need to contact them to update my details;
- Nationwide may inform me of special offers, products and services, either by letter, telephone or e-mail. If I am a new Nationwide Building Society customer and I do not wish to receive marketing material by letter, telephone or email, or any combination of these, I can write to you at Nationwide Building Society, Marketing opt-out, FREEPOST SCE 7125, Swindon SN38 9LY. If I am an existing Nationwide Building Society customer my current marketing preferences will continue unless I tell you otherwise. If I have given a previous marketing instruction to any subsidiary or trading division of Nationwide Building Society, my request to them will not change. If I require further information I can ask for a copy of your leaflet 'How Nationwide uses your personal information'. This can be requested from a branch and is also available online at nationwide.co.uk. Nationwide means Nationwide Building Society, its subsidiaries and trading divisions;
- you will make searches about me at credit reference agencies who will supply you with credit information, for use in the assessment of credit products and other information as well as information from the Electoral Register, for the purpose of verifying my identity. The agencies will record details of the search type (credit or identification) and any previous and subsequent names, whether or not my application proceeds. I acknowledge that multiple credit searches may affect my ability to obtain credit elsewhere. You may use credit-scoring methods to assess my application and to verify my identity. Credit searches and other information, including any previous and subsequent names, which is provided to you and/or the credit reference agencies, about me and those with whom I am linked financially may be used by Nationwide and other companies if credit decisions are made about me. Any of this information may also be used for identification purposes, debt tracing and the prevention of money laundering as well as the management of my account;
- any information about me and my account can be shared within Nationwide to prevent or detect fraud, or to assist in verifying my identity. You may also search the records of fraud prevention agencies who will supply you with information. You may pass information to financial and other organisations involved in fraud prevention to protect yourselves and your customers from theft and fraud. If I give you false or inaccurate information and you identify fraud, you will record this and pass it to fraud prevention agencies to prevent fraud and money laundering;
- Joint Accounts  
by making a joint application, I am creating a financial association with the other applicant, I am also confirming that I am entitled to:
  - disclose information about the other applicant(s) and/or anyone else referred to by me
  - authorise you to search, link and/or record information at credit reference agencies about me and/or anyone else referred to by me
- Sole accounts  
information held about me by the credit reference agencies may already be linked to another individual who has an existing financial association with me. For the purposes of my application I may be treated as financially linked and my application will be assessed with reference to any 'associated' records;
- where I borrow or may borrow from you, you may give details of my account and how I manage it to credit reference agencies. If I borrow and do not repay in full and on time, you may tell credit reference agencies who will record the outstanding debt;
- I have the right of access to my personal records held by you and the credit and fraud agencies. Nationwide charges a fee for this service. I can ask for a copy of your leaflet 'How Nationwide uses your personal information' which will tell me how to apply for my records and explains in more detail how my information will be used by Nationwide, the fraud prevention agencies and any permitted third parties. You may make changes from time to time to this leaflet and I can obtain a copy of the most recent version at any time from a branch or online at nationwide.co.uk;
- you may, but are not obliged, to give the Intermediary who introduces this mortgage application to you, a copy of any offer you make me or the reason for declining the application, a copy of any valuation you ask to be carried out, details of any complaints I make prior to completion and any other information you consider necessary to process my application through to completion. This may include updates by text messaging and email. You may pay the same intermediary a fee for introducing this mortgage application to you;
- a credit search will be made for each individual application to Nationwide;

- you may also use text messaging to update me on the progress of my application. If I prefer not to receive updates in this way I have marked x in the box to opt out ;
- you may transfer my information to a country that is outside the European Economic Area for the purposes of managing and administering my account and you will ensure that the security of my data is maintained;
- by signing this application, I agree to the declaration and the section entitled 'Use of my information' and to you using my information in this way. If applicable, I also agree to be bound by the terms of your charitable assignment scheme provided to me in my application, which means I will not receive a bonus if Nationwide converts to a bank.

1st applicant's signature \_\_\_\_\_ Date DD   MM   YYYY

2nd applicant's signature \_\_\_\_\_ Date DD   MM   YYYY

**Intermediary**

- Where a client is not present to sign the declaration, I confirm that the information on this form has been provided by the applicant(s) to me and I have made him/her aware to which lender the information will be passed. I also confirm that I have read him/her the full declaration detailing use of this information.

Signature of Intermediary recording information \_\_\_\_\_ Date DD   MM   YYYY

Nationwide Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 106078. You can confirm our registration on the FCA's website [www.fca.org.uk](http://www.fca.org.uk) or by contacting the FCA on 0800 111 6768.

Part 2

14. Property to be mortgaged

Address of property

Two long horizontal text input boxes for the address of the property.

Postcode

Postcode input box.

Property description

House  Bungalow  Purpose built flat  Maisonette  Converted flat  Converted maisonette

Property type

Detached  Semi detached  Terraced  Other (inc. Flats)  If the property is a flat, how many floors does the building have?  Floor number of Flat  Is there a lift? Yes  No

Number of bedrooms

Number of bedrooms input box.

Who should the valuer contact to gain access to the property?

Text input box for contact name.

Telephone (incl STD code)

Telephone input box.

If the security property is located in Scotland please provide details of who carried out the Home Report

Contact name

Contact name input box.

Text input box for address details.

Text input box for address details.

Postcode

Postcode input box.

Contact telephone number

Contact telephone number input box.

Date the report was carried out

Date input box with labels D D M M Y Y Y Y.

Name, address and telephone number of the Estate Agent selling the property or the vendor if a private sale

Contact name

Contact name input box.

Text input box for address details.

Text input box for address details.

Postcode

Postcode input box.

Telephone if different from above

Telephone input box.

Tenure

Freehold  Feuhold  Leasehold  Other

If leasehold please state

Unexpired term  years

New properties and properties less than 2 years old

Is it NHBC or Foundation 15 registered, or covered by a Zurich Municipal Building Guarantee? Yes  No

If No, is it being supervised by, or was it supervised by a qualified architect? Please give name and address of architect.

Text input box for architect name.

Text input box for architect address.

Postcode

Postcode input box.

Construction type (if known)

Standard (e.g brick walled/tiled roof)  Other (please specify)

Other construction type input box.

If other use Additional Information section at the end of this form if necessary

Year built

Year built input box with labels Y Y M M.

Is the property a new build, newly converted, refurbished?

Yes  No

How many acres of land does the property have (if more than one)?

Acres input box.

Is the property subject to any agricultural restrictions and/or will the land be used for agricultural or business purposes? Yes  No

If Yes, please provide details in the Additional Information section at the end of this form

Will you personally use the whole property for residential use?

Yes  No  If No, please state the proportion of the property to be used for non residential purpose and exactly what that use will be.

Text input box for non-residential use details.

Text input box for non-residential use details.

## 15. Your solicitor/licensed conveyancer

Name and address of your solicitor or licensed conveyancer

Postcode

If you have not already instructed a solicitor, the Society will be able to put you in touch with one.

Contact

Telephone (incl STD code)

**OFFICE USE ONLY** Code

## 16. Your valuation/survey requirements

The Society is legally obliged to assess the value of the property for mortgage purposes and may obtain a valuation report. However, this report will not be adequate for the purposes of someone wishing to purchase and live in the property. The report may not reveal serious defects and there may be important inaccuracies or omissions. It will not be a Structural or Building Survey Report and will be based upon a limited inspection. You are therefore strongly advised to obtain your own report on the condition and value of the property, based on a fuller inspection. You may wish to make your own arrangements or if you prefer, you may choose one of the alternatives below. Full information on these alternatives and fee levels is available from your local branch and, in the case of the structural building survey, directly from the surveyor.

**If you wish, as advised, to obtain a fuller report please indicate which type you require.**

- a) Homebuyers Report       b) A Full Structural or Building Survey Report       c) Home Report (Scottish properties only)

**Note: The Valuer will not undertake a Homebuyer Inspection until the Homebuyer Report application has been completed.**

- d) If you do not wish to obtain a fuller report, and you are prepared to accept a valuation report for the Society's purposes, please tick the box

If you opt for a Homebuyer Report please enclose the Homebuyer Report fee made payable to Nationwide Corporate Account. If you are arranging a full structural survey you will need to pay the standard valuation fee to Nationwide (if applicable) and pay the Valuer direct for the structural survey.

The Society may also request that a Chartered Structural Engineer's report be provided to consider whether the property represents suitable mortgage security. The provision of such a report will be at your own expense and does not guarantee that the mortgage will be granted.

## 17. Your buildings insurance requirements

### Buildings Insurance

I confirm that I have arranged my buildings insurance elsewhere

Yes  No

If you have answered Yes, please confirm the following:

Insurance provider

Policy number

Renewal month

Sum insured

£

## 18. Declaration, use of my information and charitable assignment

### Declaration

I (each of us if more than one is applying) agree that:

- (a) you will rely on the information I have given you on this form, which I confirm is complete and true. You may decide to decline my application;
- (b) as well as your Mortgage Conditions, Nationwide's Rules apply to this account and I can obtain a copy of these in any of your branches;
- (c) you must have the property valued for your own purposes. You recommend that I arrange for a more detailed inspection for my own purposes;
- (d) you will keep any form of commission insurers may give you for arranging my insurance with them as part of this mortgage;
- (e) if I take out a mortgage with you, you may transfer it to another lender who may not be (or be associated with) a building society. You will tell me before you do this and how it will affect my mortgage, but I will no longer have the benefit of your Rules;
- (f) if applicable, I may have to show where the money for the deposit on the property I am buying came from;
- (g) for joint applications, Nationwide will only send documents and correspondence to one address. Before completion of the mortgage, this will be the address of the first applicant and after completion, this will be the security address or an agreed correspondence address;
- (h) in the case of a remortgage, Nationwide will instruct a solicitor to deal with the legal aspects of my remortgage and pay the fees. I will be responsible for any non-standard legal fees in relation to the remortgage, including any independent legal advice I wish to take;
- (i) Fixed and tracker rates are limited offers and may be withdrawn at any time;
- (j) where I have indicated that debt will be repaid, on or before completion, you will disregard it from your assessment of my application as you will regard my signature on this application form as being my undertaking to repay this debt.

### Use of my information

- (k) Any information about me and my account may be shared within Nationwide to open and manage the account, make lending decisions, collect debts, trace debtors, prevent fraud and money laundering and for business analysis. It may also be shared within Nationwide and with specialist companies for market research purposes on behalf of Nationwide. It may also be shared with other organisations for the purposes of them providing products and services in association with or on behalf of Nationwide. We will use the email address you have provided to contact you about your application and servicing your account; this may include sending you important legal documentation. Nationwide may use my information to populate application forms for products provided or introduced by Nationwide. If I notify you of changes to my personal details, it is your normal practice to update all of my accounts unless I ask you not to. If I have opened an account or policy with another organisation introduced or provided to me by Nationwide, I will need to contact them to update my details;
- (l) Nationwide may inform me of special offers, products and services, either by letter, telephone or e-mail. If I am a new Nationwide Building Society customer and I do not wish to receive marketing material by letter, telephone or email, or any combination of these, I can write to you at Nationwide Building Society, Marketing opt-out, FREEPOST SCE 7125, Swindon SN3B 9LY. If I am an existing Nationwide Building Society customer my current marketing preferences will continue unless I tell you otherwise. If I have given a previous marketing instruction to any subsidiary or trading division of Nationwide Building Society, my request to them will not change. If I require further information I can ask for a copy of your leaflet 'How Nationwide uses your personal information'. This can be requested from a branch and is also available online at nationwide.co.uk. Nationwide means Nationwide Building Society, its subsidiaries and trading divisions;
- (m) I will make searches about me at credit reference agencies who will supply you with credit information, for use in the assessment of credit products and other information as well as information from the Electoral Register, for the purpose of verifying my identity. The agencies will record details of the search type (credit or identification), and any previous and subsequent names, whether or not my application proceeds. I acknowledge that multiple credit searches may affect my ability to obtain credit elsewhere. You may use credit-scoring methods to assess my application and to verify my identity. Credit searches and other information, including any previous and subsequent names, which is provided to you and/or the credit reference agencies, about me and those with whom I am linked financially may be used by Nationwide and other companies if credit decisions are made about me. Any of this information may also be used for identification purposes, debt tracing and the prevention of money laundering as well as the management of my account;
- (n) any information about me and my account can be shared within Nationwide to prevent or detect fraud, or to assist in verifying my identity. You may also search the records of fraud prevention agencies who will supply you with information. You may pass information to financial and other organisations involved in fraud prevention to protect yourselves and your customers from theft and fraud. If I give you false or inaccurate information and you identify fraud, you will record this and pass it to fraud prevention agencies to prevent fraud and money laundering;
- (o) Joint accounts  
by making a joint application, I am creating a financial association with the other applicant, I am also confirming that I am entitled to:
  - disclose information about the other applicant(s) and/or anyone else referred to by me
  - authorise you to search, link and/or record information at credit reference agencies about me and/or anyone else referred to by me;Sole accounts  
information held about me by the credit reference agencies may already be linked to another individual who has an existing financial association with me. For the purposes of my application I may be treated as financially linked and my application will be assessed with reference to any 'associated' records;
- (p) where I borrow or may borrow from you, you may give details of my account and how I manage it to credit reference agencies. If I borrow and do not repay in full and on time, you may tell credit reference agencies who will record the outstanding debt;
- (q) I have the right of access to my personal records held by you and the credit and fraud agencies. Nationwide charges a fee for this service. I can ask for a copy of your leaflet 'How Nationwide uses your personal information' which will tell me how to apply for my records and explains in more detail how my information will be used by Nationwide, the fraud prevention agencies and any permitted third parties. You may make changes from time to time to this leaflet and I can obtain a copy of the most recent version at any time from a branch or online at nationwide.co.uk;
- (r) you may, but are not obliged, to give the Intermediary who introduces this mortgage application to you, a copy of any offer you make me or the reason for declining the application, a copy of any valuation you ask to be carried out, details of any complaints I make prior to completion and any other information you consider necessary to process my application through to completion. This may include updates by text messaging and email. You may pay the same intermediary a fee for introducing this mortgage application to you;
- (s) a credit search will be made for each individual application to Nationwide;
- (t) you may also use text messaging to update me on the progress of my application. If I prefer not to receive updates in this way I have marked x in the box to opt out ;
- (u) you may transfer my information to a country that is outside the European Economic Area for the purposes of managing and administering my account and you will ensure that the security of my data is maintained;
- (v) by signing this application, I agree to the declaration and the section entitled 'Use of my information' and to you using my information in this way. If applicable, I also agree to be bound by the terms of your charitable assignment scheme provided to me in my application, which means I will not receive a bonus if Nationwide converts to a bank.

### CHARITABLE ASSIGNMENT

THE FOLLOWING WORDING APPLIES TO YOU UNLESS:

- (1) YOU WERE A MEMBER OF THE SOCIETY ON 2 NOVEMBER 1997 AND HAVE CONTINUED TO BE A MEMBER EVER SINCE THAT DATE; OR
- (2) YOU FALL WITHIN A SPECIAL CATEGORY OF PERSONS TO WHOM OUR CHARITABLE ASSIGNMENT SCHEME DOES NOT APPLY.

By applying to open an account after 2nd November 1997, you also apply to be a charity member of The Nationwide Foundation ('the Foundation') unless you are already a charity member.

You agree that, if:

- the account is opened by the Society and you are or become a charity member of the Foundation; and
- the Society subsequently enters into an agreement to transfer the whole of its business to a company,

you will assign to the Foundation (or any charity(ies) nominated by it, but to no other person) all rights to or in connection with any conversion benefits to which you would otherwise become entitled as a member or depositor at any time before, or within two years, after your membership of the Society comes to an end.

You make this agreement:

- (a) with the Society (acting for itself and for the benefit of the Foundation), in return for the Society opening the account you are applying for, and you acknowledge that the Foundation may enforce the benefit of your agreement with the Society under the Contracts (Rights of Third Parties) Act 1999; and
- (b) with the Foundation directly, in return for the Foundation granting you charity membership (if you are not already a member).

This agreement means that, without any further notice to you:

- the Society may make over to the Foundation (or to any charity(ies) nominated by it) any such conversion benefits; and
- the Foundation may exercise all your rights in relation to any such benefits.

You understand that this agreement is irrevocable and cannot be amended or varied without the consent of both the Society and the Foundation and that neither the Society nor the Foundation will release you from this agreement.

You understand that (except in the case of any class of person where the Society considers this to be inappropriate) the Society will require on behalf of itself and the Foundation that all applicants for share and mortgage accounts agree to the above condition (or a condition having substantially the same effect), unless the Society decides and announces by press release that it is no longer in the best interests of the Society to do so generally on a continuing basis. Any such decision by the Society would not have retrospective effect and you would continue to be bound by the above condition.

For this purpose:

'conversion benefits' means any benefits under the terms of any future transfer of the Society's business to a company (i.e. on conversion or takeover) except the statutory right to have shares in the Society (including any balances on share accounts) converted into deposits with the company; and 'Society' means Nationwide Building Society and, if it merges with any other building society, includes such other society.

I hereby authorise Nationwide Building Society to obtain a reference(s) from any Mortgagee/Landlord/Accountant named in this application and details of my employment from my current or previous employer(s).  
Further, I hereby irrevocably authorise the Society to obtain all such information regarding my Equity ISA/Endowment/Pension and any insurances referred to in this application.  
I authorise any lender with whom I hold a mortgage or loan account to provide Nationwide with repayment figures for all my outstanding loans or charges on my property and to release the title deeds and documents to Nationwide upon their request.  
I have read and agree to the declaration and, if applicable to me, the Charitable Assignment that I have received with this application.  
I confirm that where fees are collected by credit/debit card that this is with my authority for payment, having originally provided details to you.  
I understand that these credit card details will not be retained after the payments have been taken.

<b>First Applicant's Signature</b>	1	Date	D	D	M	M	Y	Y	Y	Y
<b>Second Applicant's Signature</b>	2	Date	D	D	M	M	Y	Y	Y	Y

Please sign within a white box

Nationwide Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 106078. You can confirm our registration on the FCA's website [www.fca.org.uk](http://www.fca.org.uk) or by contacting the FCA on **0800 111 6768**.  
Nationwide Buildings and Contents Insurance is underwritten by UK Insurance Ltd. Registration number 1179980. Registered at UK Insurance Ltd, The Wharf, Neville Street, Leeds, LS1 4AZ.

## 19. Additional information

Details of previous addresses including dates moved in

Details of properties taken into possession and mortgage/rent arrears

Correct address to write to for a reference

Further details of other regular monthly outgoings including all information requested

Details of bankruptcy, insolvency, arrangements with creditors etc

Details of county court judgments etc

Additional endowment policies

Construction of property

For Non-EEA Nationals

Are you seeking asylum in the UK?

Yes  No

If No, do you hold refugee status as recognised under the 1951 UN conventions & its 1967 protocol?

Yes  No

Do you have indefinite leave to remain in the UK?

Yes  No

If No, do you have a work permit/visa with Tier 1 or Tier 2 immigration status?

Yes  No

If No, have you legally been a UK resident for at least one year?

Yes  No

Do you hold diplomatic immunity status?

Yes  No

If you are not a refugee and do not have indefinite leave to remain in the UK:

Do you have 25% deposit from your own resources?

Yes  No

Is your salary paid to a UK bank account?

Yes  No

### Other Ported Mortgages

Account number:

Amount:

Amount on interest only and mortgage term:

## 19. Additional information (continued)

Details of properties for which the applicant will not remain on the mortgage after completion: Applicant 1

### Mortgage 1:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold? Yes  No

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation? Yes  No

### Mortgage 2:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold? Yes  No

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation? Yes  No

### Mortgage 3:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold? Yes  No

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation? Yes  No

Details of properties for which the applicant will not remain on the mortgage after completion: Applicant 2

### Mortgage 1:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold? Yes  No

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation? Yes  No

### Mortgage 2:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold? Yes  No

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation? Yes  No

### Mortgage 3:

Lender name:

Account number:

Address of property:

Postcode:

Will the property be sold? Yes  No

If yes, what is the property sale price?

Will you be using any equity from the sale of this property for debt consolidation? Yes  No

Any other additional information



**For office use only**

Identification requirements:

First Applicant

Second Applicant

Confirming name

Type:

Serial Nos:

Type:

Serial Nos:

Confirming address

Type:

Serial Nos:

Type:

Serial Nos:

Additional check (remote only)

Type:

Serial Nos:

Type:

Serial Nos:

Branch/Employees details

Prefix	Employee No.
--------	--------------

Type:

SCA QQ Number
---------------

Please complete this form in BLOCK CAPITALS using blue or black ink

Originator's Identification Number

Reference number

**Your bank or building society details**

Bank/Building Society name	<input type="text"/>	
Branch address Property number	<input type="text"/>	and/or Property name <input type="text"/>
Street	<input type="text"/>	
Town	<input type="text"/>	Postcode <input type="text"/>
Name(s) of account holder(s)	<input type="text"/>	
	<input type="text"/>	
Bank/Building Society Sort code & account number	<input type="text"/>	<input type="text"/>

**Banks and Building Societies may not accept Direct Debit instructions from some types of account.**  
 Please pay Nationwide Building Society 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 Nationwide Building Society and, if so, details will be passed electronically to my Bank/Building Society.

<b>Signature(s)</b>	<input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>
	Please sign within a white box <input type="text"/>	Date	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>

**If two signatures are required to operate this account, please ensure both account holders sign this form.**

**This is not part of the instruction to your Bank or Building Society.**

Direct Debits are usually collected on the 1st of the month unless you ask for a different day (2-28). Your first payment is due the month after you complete your mortgage and will include interest for the month of completion as well as one full monthly payment. After that, payments will be your regular monthly amount.

Preferred payment date (if not the 1st of the month)

**The Direct Debit Guarantee on this page should be detached and kept by the account holder.**

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 Nationwide Buildings and Contents Insurance is underwritten by UK Insurance Ltd. Registration number 1179980. Registered at UK Insurance Ltd, The Wharf, Neville Street, Leeds, LS1 4AZ.

**THE DIRECT DEBIT GUARANTEE (Please retain this)**

- 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 Nationwide Building Society will notify you seven days in advance of your account being debited or as otherwise agreed. If you request Nationwide Building Society to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Nationwide Building Society 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 Nationwide Building Society 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.







## Mortgage fees

Dependent on your application type, a non-refundable booking fee may need to be paid upfront upon reservation. Applications without a booking fee (if applicable) will not be reserved. Fees can be paid via card or cheque, please complete the following section(s) if you are paying fees by card or alternatively enclose a signed cheque for the applicable fees.

### Booking fee amount

£

 The information I provide relating to my debit/credit card will be used to take a payment for £\_\_\_\_\_ to cover the booking fee. Once this payment has been processed, the details will be destroyed. By providing my debit/credit card details I agree you can use my information in this way.

Please charge my VISA / MasterCard / Solo (delete as applicable).

Card number

Name(s) of account holder(s)

Expiry date

Start date (if applicable)

Issue number (if applicable)

### Signature


Date

Name as shown on card

### Product fee amount

£

Add fee to loan Yes  No

 The information I provide relating to my debit/credit card will be used to take a payment for £\_\_\_\_\_ to cover the product fee. Once this payment has been processed, the details will be destroyed. By providing my debit/credit card details I agree you can use my information in this way.

Please use the same card details as above

Please charge my VISA / MasterCard / Solo (delete as applicable).

Card number

Name(s) of account holder(s)

Expiry date

Start date (if applicable)

Issue number (if applicable)


### Signature

Date

Name as shown on card

### Valuation fee amount

£

 The information I provide relating to my debit/credit card will be used to take a payment for £\_\_\_\_\_ to cover the valuation fee. Once this payment has been processed, the details will be destroyed. By providing my debit/credit card details I agree you can use my information in this way.

Please use the same card details as above

Please charge my VISA / MasterCard / Solo (delete as applicable).

Card number

Name(s) of account holder(s)

Expiry date

Start date (if applicable)

Issue number (if applicable)

### Signature

Date

Name as shown on card

If you choose to use the same card for all of the fees, this will show as separate payments on your bank statement. All card details will be destroyed after payment has been authorised.