

# Personal Information Form



## Applicants details

	First Applicant	Second Applicant
Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>
Please enter ALL forenames	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Date of birth	DDMMYYYY Gender (please tick) <input type="checkbox"/> M <input type="checkbox"/> F	DDMMYYYY Gender (please tick) <input type="checkbox"/> M <input type="checkbox"/> F
Marital status	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"/>	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 partnership are couples registered under the Civil Partnership Act 2004		
Number of dependents	<input type="text"/>	<input type="text"/>
Nationality (required for regulatory reasons)	<input type="text"/>	<input type="text"/>
Present address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Telephone numbers:		
Home (incl STD code)	<input type="text"/>	<input type="text"/>
Work (incl STD code)	<input type="text"/>	<input type="text"/>
Mobile telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>

## Employment details

Occupation	<input type="text"/>	<input type="text"/>
Nature of business	<input type="text"/>	<input type="text"/>
Name and address of employer or your business name and address if self-employed	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Length of service and employee number (if known)	MMYY <input type="text"/>	MMYY <input type="text"/>
Is your employment on a fixed term contract?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Basic Pay (before tax)	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Bonus	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Overtime	£ <input type="text"/> per annum	£ <input type="text"/> per annum
Commission	£ <input type="text"/> per annum	£ <input type="text"/> per annum
or if you are a Director/Shareholder of a Ltd Co and have >20% shareholding, please provide annual salary/dividend	£ <input type="text"/> latest year	£ <input type="text"/> latest year
	£ <input type="text"/> previous year	£ <input type="text"/> previous year

## Employment details (continued)

### First Applicant

### Second Applicant

If self employed, name, address and telephone number of accountant

Postcode

Postcode

Telephone (incl STD code)

If self employed, please state net income for each of the last three years

£  per annum

£  per annum

£  per annum

£  per annum

£  per annum

£  per annum

What type of pension do you have? (please tick)

Company  Personal  Both  None

Company  Personal  Both  None

At what age do you plan to retire?

If the term of your mortgage takes you into retirement age how do you intend to meet the repayments?

**Please use the Additional Information section (page 6) if necessary**

If you are within 5 years of retirement please advise the Annual income you expect to receive after you have retired

£

£

Please give details of any second income

Basic Pay (before tax)

£  per annum

£  per annum

Bonus

£  per annum

£  per annum

Overtime

£  per annum

£  per annum

Commission

£  per annum

£  per annum

Job title

## Financial details

### Details of other income

Pension including state pension

£  per annum  If none, please tick

£  per annum  If none, please tick

Investment

£  per annum  If none, please tick

£  per annum  If none, please tick

Maintenance

£  per annum  If none, please tick

£  per annum  If none, please tick

State benefits or allowances

£  per annum  If none, please tick

£  per annum  If none, please tick

(please state)

Rental income from an unencumbered property

£  per annum

£  per annum

### Monthly outgoings (at commencement of this mortgage)

Shared Ownership Rent/ Equity Share charge

£   Please tick if joint with second applicant  If none, please tick

£   Do not include any that are joint with first applicant  If none please tick

Child minding fees

£

£

School fees

£

£

CSA/Maintenance

£

£

Please provide details of any credit cards, loans or monthly outgoings you may have in this section.

I do not have any credit cards, loans or monthly outgoings

Do not include details of loans held jointly with first applicant

Personal loan       Personal loan   
 Student loan       Student loan

Personal loan       Personal loan   
 Student loan       Student loan

**Financial commitments** (with more than 6 months to run that will **not** be cleared on completion)

Which company is this debt with?  
 Account number  
 Outstanding balance  
 Monthly payment  
 Is the debt secured or unsecured?  
 Is the debt in joint or sole names?

Debt 1	Debt 2

Debt 1	Debt 2

Personal loan       Personal loan   
 Student loan       Student loan

Personal loan       Personal loan   
 Student loan       Student loan

**Financial commitments** (with more than 6 months to run that will be cleared on completion)

Which company is this debt with?  
 Account number  
 Outstanding balance  
 Monthly payment  
 Is the debt secured or unsecured?  
 Is the debt in joint or sole names?

Debt 1	Debt 2

Debt 1	Debt 2

**Credit Cards that will not be cleared** (on or before completion)

**Credit card commitments**  
 Which credit card provider is this debt with?  
 Balance outstanding

Debt 1	Debt 2

Debt 1	Debt 2

**Credit card commitments**  
 Which credit card provider is this debt with?  
 Balance outstanding

Debt 3	Debt 4

Debt 3	Debt 4

**Credit Cards that will be cleared** (on or before completion)

**Credit card commitments**  
 Which credit card provider is this debt with?  
 Balance outstanding

Debt 1	Debt 2

Debt 1	Debt 2

**Credit card commitments**  
 Which credit card provider is this debt with?  
 Balance outstanding

Debt 3	Debt 4

Debt 3	Debt 4

IF YOU HAVE ANY OTHER LOANS OR CREDIT CARDS, PLEASE GIVE FULL DETAILS IN A FORMAT SIMILAR TO THE ABOVE IN THE ADDITIONAL INFORMATION SECTION (PAGE 6)

## Financial details (continued)

### First Applicant

### Second Applicant

Have you ever been bankrupt or insolvent or had a court order for non payment of a debt made against you?

Yes  No  If Yes, please give details


Yes  No  If Yes, please give details


## Property details

Do you own a property now?

Yes  No

Yes  No

Is your present property mortgaged or have you ever had a mortgage before?

Yes  No

Yes  No

If Yes, please give the following details

If Yes, please give the following details

Name and address of lender



Postcode

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

Postcode

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Account number

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

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

Monthly repayments

£ 

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

£ 

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

Balance to pay or date repaid

£ 

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

M	M	Y	Y
---	---	---	---

£ 

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

M	M	Y	Y
---	---	---	---

How much of this balance is on an interest only basis?

£ 

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

 Remaining term 

M	M	Y	Y
---	---	---	---

£ 

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

 Remaining term 

M	M	Y	Y
---	---	---	---

Are you a tenant at your present property?

Yes  No

Yes  No

If Yes, please give the following details

If Yes, please give the following details

Name and address of landlord



Postcode

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Postcode

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Rent payable

£ 

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

 monthly

£ 

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

 monthly

Over what term would you like your mortgage?

M	M	Y	Y
---	---	---	---

How would you like to make the payments on your mortgage?

Direct Debit  Transfer from a Nationwide current account  Standing order  Cash/cheque

Please note: 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.

## Solicitors details

Solicitor's name acting for all applicants and their reference (Only required in cases of transfer of ownership)

Address and telephone number of solicitor



Postcode

Postcode

Telephone (incl STD code)

## Declaration and charitable assignment

### Declaration

I/We agree that:

- The information given in this application is true to the best of my/our knowledge and that it will form the basis of any Offer of Advance made by the Society.
- The Society may
  - take up any references it considers necessary
  - use information from this form to request a Credit Reference from an agency and the agency will keep a record of the Society's request against your name.

### Guarantors

This paragraph applies only where an individual(s) is acting as Guarantor on the mortgage.

If the borrower asks to borrow from another lender, that lender may ask the Society for information relating to the Borrowers account. The guarantor agrees that their details (name and address) and the fact that they act as guarantor on the account, may be released to the lender making the enquiry. The guarantor agrees to inform the Society immediately of any changes to their name or address.

### Use of my information

- 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;
- 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 and the fraud prevention agencies;
- I have read the terms and conditions and the section entitled 'Use of my information'. By signing this application, I agree that you can use my information in this way
- You will contact me by telephone or mobile telephone regarding my application.
- You may also use text messaging and email to update me on the progress of my application. If I do not agree to updates in this way I can tick this box to opt out

### Charitable Assignment

**This paragraph applies only where a new customer(s) is joining the mortgage.**

By applying to be added as an account holder to an account after 2 November 1997, I also apply to be a charity member of the Nationwide Foundation ("the Foundation") unless I am already a charity member. I agree that, if I am added to the account by the Society and I am or become a charity member of the Foundation, I will be bound to assign to the Foundation (or any charity(ies) nominated by it, but to no other person) the rights to any conversion benefits to which I would otherwise become entitled as a member or depositor at any time before, or within two years after, my membership of the Society comes to an end. This agreement is irrevocable and authorises the Society to make over to the Foundation (or to any charity(ies) nominated by it) any such benefits without further notice to me. I understand that neither the Society nor the Foundation will release me from this agreement or vary its terms.

I 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, including any person being added as an account holder, 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 I 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, if the Society merges with any other society, after the date of such merger "Society" includes such other society.

## Signature(s)

First Applicant's Signature

Date

Second Applicant's Signature

Date

Please sign within a white box

## For office use only

Application fee £  Receipt number

Identification

First Applicant

Second Applicant

Primary ID

Type:

Type:

Serial Nos:

Serial Nos:

Secondary ID

Type:

Type:

Serial Nos:

Serial Nos:

Additional check (remote only)

Type:

Type:

Serial Nos:

Serial Nos:

I confirm that I have checked both primary and secondary identification, confirming that the address and signatures agree to the application form.

Signature  Name  Employee number

Nationwide Building Society is authorised and regulated by the Financial Services Authority under registration number 106078. Credit facilities other than regulated mortgages are not regulated by the Financial Services Authority. You can confirm our registration on the FSA's website, [www.fsa.gov.uk](http://www.fsa.gov.uk) or by contacting the FSA on 0845 606 1234.

Nationwide Lifestyle Protector is underwritten by Pinnacle Insurance plc. Registration number 1007798. Registered Office Pinnacle House, A1 Barnet Way, Borehamwood, Herts, England WD6 2XX.

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

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 **08457 30 20 10**.

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 TypeTalk. Just dial **18001** followed by the full telephone number you wish to ring.

**Nationwide Building Society**  
Head Office, Nationwide House,  
Pipers Way, Swindon, SN38 1NW

