

Data Capture Form

This form is for intermediaries' internal use only and is not approved for issuing to customer(s). The information on this form may be used to assist the intermediary if an application is made to Nationwide. This form should not be used as an indication of Nationwide's lending criteria, which you can find by visiting **nationwide-intermediary.co.uk/lending-criteria**

Before you complete this form for the applicant, please make sure they have seen 'How Nationwide uses your information' by visiting **nationwide.co.uk/privacy**, and they have understood how their information will be used.

Applicant Details	Applicant 1	Applicant 2
Title		
Forename		
Second name		
Surname		-
Gender	Male Female	Male Female
Country of birth		- Male Terriale
Date of birth	D D M M Y Y	D D M M Y Y
National Insurance number		
Postcode		_
	Details of Financial dependants Aged from 0-5	Details of Financial dependants Aged from 0-5
Are you intending to port any loans?	Yes No If yes, please provide	Yes No If yes, please provide
	the existing mortgage account number The bank account number the Direct Debit is taken from	the existing mortgage account number The bank account number the Direct Debit is taken from
Application type	New purchase Remortgage A	Additional borrowing
What is this property application for?	Owner occupation	Second property
If a second property application, please indicate what the intended use of the property is?	Main residence Home for dependant relative	Holiday home in the UK Second property due to work location
Applicant type	First time buyer	First time buyer
	Existing Nationwide borrower	Existing Nationwide borrower
	Borrower with another lender	Borrower with another lender
	Previous Nationwide borrower	Previous Nationwide borrower
	Previous borrower with another lender	Previous borrower with another lender
Property ownership type	Standard Right to I Shared ownership Equity sh	
Does the applicant own a mortgage free property?	Yes No	Yes No
If yes, what is the estimated value?	£	
Purchase Right To Buy	Loan amount?	£
	Discounted purchase price?	£
	What is the full market value of the property?	£
Remortgage Right To Buy	Original Date of Purchase?	D D M M Y Y
,	Loan amount?	£
	Current estimated value?	£
	What is the amount being transferred from another lend	ler? £
Purchase shared ownership detail	What is the purchase price of your share?	£
	What is the full market value of the property?	£
Remortgage Shared Ownership Details	What is the amount being transferred from another lend	ler? £
Is the property to be used for residential purposes?		Yes No
Loan amount		£
Repayment Type*	☐ Interest Only ☐ Capital and Interest ☐ Part and Part *If Part & Part please state the split	Repayment £ Interest only £
What is the purchase price or current estimated value	?	£
Term of mortgage		Y Y M M
If applicable – what is the amount being transferred fi	rom another lender?	£
Purchase equity share detail	What type of equity share scheme is it? Builder's equity loan	Housing Association/Local Authority/National Gov't Developer and HCA/GLA Co-Funded
	What is the purchase price of the share?	£
	What is the full market value of the property?	£
	Equity shareholder name	_
	What date does the equity share loan first become due for	or repayment? DDDMMYYY



	Restricted resale price	what is the purchase price:	<u> </u>		±
		What is the full market valu	e of the property?	Please state the % re	striction
	Genuine bargain price	What is the purchase price?	?		£
		What is the full market valu	e of the property?		£
	Security Details				
	Have you found a property yet?	Yes No			
	If yes, property type:	Terraced house	Semi detached	Detached house	Terraced bungalow
		Semi detached bungalo	ow Converted flat/	maisonette Purpo	se built flat/maisonette
	Is the property a new build/newly converted or refurbished?	Yes No			
	Tenure:	Freehold	Leasehold	Commonhold	Ownership Scotland
	Does this application relate to a special scheme?	☐ None ☐ Help to Buy			
2.	Details of property to be mortgaged				
	Is the mortgage for the applicants existing residence?	Yes No		Yes No	
	House number				
	House name				
	Flat				
	Street				
	Town				
	County				
	Postcode				
	Which area of the UK is the property in?		England & Wales	Northern Ireland	Scotland
	Region of the security address e.g. South West, North East, Greater London	,			
	Tenure	Freehold	Commonhold	Leasehold	Ownership Scotland
	What is your relationship to the seller?	☐ No relationship	Family member	Partner	Friend
		Business associate	☐ Work colleague	Employer	Landlord
	If Leasehold, how many years remaining on the lease?	Dusiliess associate	Work colleague	Епіріоуеі	Landiold
	What will the new or extended term of the lease be at the t	time of completion?			
_					
3.	Source of Deposit (record each source separately).				
	Part 1 – What is the source of your deposit?	Savings account in UK (or EEA Builder c	ashback Vendor cashbac	k or incontivo
	10.00 10.00	Savings account outsid	le of UK or EEA Gift	L Equity	LSAP
	* If Gift, please complete the Gifted Deposit declaration for	<u>n.</u>			C
	How much is from this source? What is/will be your monthly repayment (Loans only)?				£
	If from Equity, what is the sale price of the property?				£
	Part 2 - What is the source of your deposit? (Please tick one b				
	Tare What is the source of your deposit. (Hease texone s	Savings account in UK	or EEA Builder c	ashback Vendor cashbac	k or incentive
		Savings account outsid		Equity	LSAP
	How much is from this source?		ic of orton EEA	Equity	£
	What is/will be your monthly repayment (Loans only)?				£
	If from Equity, what is the sale price of the property?				£
	* If Gift, please complete the Gifted Deposit declaration for	 m.			
	Part 3 - What is the source of your deposit? (Please tick one b				
		Savings account in UK	or EEA Builder c	ashback Uendor cashbac	k or incentive
		Savings account outsid	le of UK or EEA Gift*	☐ Equity	LSAP
				1. 7	
	How much is from this source?				£
	How much is from this source? What is/will be your monthly repayment (Loans only)?				£
4.	What is/will be your monthly repayment (Loans only)?	Indicate purpose of Capit	tal Raising		£
4.	What is/will be your monthly repayment (Loans only)? If from Equity, what is the sale price of the property?	Indicate purpose of Capit	tal Raising	Amount for this purpos	£
4.	What is/will be your monthly repayment (Loans only)? If from Equity, what is the sale price of the property? Remortgage with Capital Raising	Indicate purpose of Capit	al Raising	Amount for this purpos Amount for this purpos	£ £
4.	What is/will be your monthly repayment (Loans only)? If from Equity, what is the sale price of the property? Remortgage with Capital Raising Repay unsecured debts	Indicate purpose of Capit	al Raising		£ £ se £



Buy out partner's interest (non-borrower)		Amor	unt for this purpose £
Buy a share in freehold		Amor	unt for this purpose £
Buy freehold title or new extended lease		Amo	unt for this purpose £
Buy land to extend security		Amo	unt for this purpose £
Buy property for main residence & let current property		Amo	unt for this purpose £
Purchase land/property separate from the security		Amo	unt for this purpose £
Pay off second charge		Amo	unt for this purpose £
5. Additional Borrowing (Further Advance)			
Non-structural home improvements		Amo	unt for this nurners £
Structural home improvements			unt for this purpose £ unt for this purpose £
Purchase land/property separate from the security			unt for this purpose £
Buy a share in the freehold			unt for this purpose £
Buy out partner's interest (non-borrower)			unt for this purpose £
Other personal consumption			unt for this purpose £
Repay unsecured debts			unt for this purpose £
nepay unsecured debts		Allio	unt for this purpose 1
6. Nationality: Inside of the EEA		Applicant 1	Applicant 2
Nationality			
Second Nationality (if applicable)			
Are you a permanent UK resident?		Yes No	Yes No
If not a permanent resident – Will a family member who a permanent UK resident be a joint party to this mortga and occupy the property on completion?		Yes No	Yes No
Have you changed your name in the last 3 years?		Yes No	Yes No
		Title	Title
		Forename	Forename
		Second name	Second name
		Surname	Surname
		Gender	Gender
Nationality: Outside of the EEA		Applicant 1	Applicant 2
Are you seeking asylum in the UK?		Yes No	Yes No
Do you hold refugee status as recognised under the 195 and its 1967 protocol?	51 UN conventions	Yes No	Yes No
Do you have indefinite leave to remain in the UK?		Yes No	Yes No
Nationality: Outside of the EEA (cont)		Applicant 1	Applicant 2
Is your salary paid into a UK bank account?		Yes No	Yes No
Do you have a tier 1/tier 2 work permit/visa?		Yes No	Yes No
Have you legally been a UK resident for at least three ye	ears?	Yes No	Yes No
Do you hold diplomatic immunity status?		Yes No	Yes No
Have you changed your name in the last 3 years?		Yes No	Yes No
		Title	Title
		Forename	Forename
		Second name	Second name
		Surname	Surname
		Gender	Gender
7. Please note only UK addresses accepted Address Details – Current Address	Applicant 1	Аррі	icant 2
House number			
Flat			
House name			
Street			
District			
Town			
County			
Postcode			
How long were you at this address?		Y Y M M	Y Y M M



Occupancy Status	Owner occupier Council tenant	Owner occupier Council tenant
	Private tenant	Private tenant
	Living with friends/relative	Living with friends/relative
	Provided by employer	Provided by employer
	Renting from a Housing Association	Renting from a Housing Association
Is there a letting agent?	Yes No	Yes No
Address Details - Previous Address 1	Applicant 1	Applicant 2
House number		
Flat		
House name		
Street		
District		
Town		
County		
Postcode		
How long were you at this address?	Y Y M M	Y Y M M
Occupancy status	Owner occupier	Owner occupier
	Council tenant	Council tenant
	Private tenant	Private tenant
	Living with friends/relative	Living with friends/relative
	Provided by employer	Provided by employer
	Renting from a Housing Association	Renting from a Housing Association
Address Details - Previous Address 2	Applicant 1	Applicant 2
House number		
Flat		
House name		
Street		
District		
Town		
County		
Postcode		
How long were you at this address?	Y Y M M	Y Y M M
Occupancy status	Owner occupier	Owner occupier
	Council tenant	Council tenant
	Private tenant	Private tenant
	Living with friends/relative	Living with friends/relative
	Provided by employer	Provided by employer
	Renting from a Housing Association	Renting from a Housing Association
Employment Details	Applicant 1	Applicant 2
Main Employment		
How are you employed?	Permanent Temporary	Permanent Temporary
	Permanent Temporary Fixed term contract Sub contractor fixed term	Fixed term contract Sub contractor fixed term
	Sub contractor open ended Sole trader	Sub contractor open ended Sole trader
	Partner Director 20% or less shareholding	Partner Director 20% or less shareholding
	Director more than 20% shareholding	Director more than 20% shareholding
	☐ Not employed ☐ Retired ☐ Student	☐ Not employed ☐ Retired ☐ Student
	Homemaker	Homemaker
Occupation		
Industry		
Annual salary	£	£
Bonus	£	£
Frequency	Annually Quarterly Monthly	Annually Quarterly Monthly
	Four weekly Weekly	Four weekly Weekly
Overtime	£	£



8.

Frequency	Annually Quarte	erly 🗌 Meekly	4onthl	у		Annually Quarterl		nthly	
Commission	£					£			
Frequency	Annually Quarterly Monthly Four weekly Weekly				Annually Quarterly Monthly Four weekly Weekly				
Time with current employer		Υ	Υ	М	М		Υ	Y	М
If less than 1 year - are you in a probation period?	Yes No					Yes No			
Do you have a previous employer?	Yes No					Yes No			
If yes	Start date	Υ	Υ	М	М	Start date	Υ	Υ	ММ
•	End date	Υ	Υ	М	М	End date	Υ	Y	М М
How were you employed?									
Employment type									
Gross annual income	£					£			
Occupation						_			
Fixed Term Contract									
How long have you been contracting?		Y	Υ	М	М		Y	Y	ММ
What is the remaining term on current contract?		Y	Υ	М	М		Y	Y	М
Contract likely to be renewed?	Yes No					Yes No			
Time with current employer		Υ	Υ	М	М		Y	Y	ММ
If less than 1 year - are you in a probation period?	Yes No					Yes No			
Do you have a previous employer?	Yes No					Yes No			
If yes	Start date	Υ	Υ	М	М	Start date	Y	Y	M M
yes	End date	Y	Υ	М	М	End date	Y		M M
How were you employed?] 			
Employment type									
Gross annual income	£					£			
Occupation									
Sub Contractor Open Ended									
Are you treated as employed for tax purposes?	Yes No					Yes No			
If Yes – annual salary	£					£			
Bonus	£					£			
Frequency	Annually Quarte	erly 🗌 N	4onthl	У		☐ Annually ☐ Quarter	y 🗌 Mor	nthly	
	Four weekly We	-				Four weekly Weel	kly		
Overtime	£					<u>£</u>			
Frequency	Annually Quarte	erly 🗌 N	4onthl	y		Annually Quarter	y 🗌 Mor	nthly	
	Four weekly We	eekly				Four weekly Wee	kly		
Commission	<u>£</u>					<u>£</u>			
Frequency	☐ Annually ☐ Quarte	erly 🗌 N	4onthl	у		Annually Quarter	y 🗌 Mor	nthly	
	Four weekly We	ekly				Four weekly Weel	kly		
If No - Net profit before tax latest period	£					<u>£</u>			
If No - Net profit before tax previous period	£					<u>£</u>			
Time with current employer		Y	Υ	М	М		Υ	Y	М
If less than 1 year - are you in a probation period?	Yes No					Yes No			
Do you have a previous employer?	Yes No					Yes No			
If Yes	Start date	Y	Υ	М	М	Start date	Y	Y	ММ
	End date	Y	Υ	М	М	End date	Y		M M
How were you employed?						<u> </u>			
Employment type									
Gross annual income	£					£			
Occupation									



Sub Contractor Fixed Term		
How long have you been contracting?	Y Y M M	Y Y M M
What is the remaining term on current contract?	Y Y M M	Y Y M M
Current contract likely to be renewed?	Yes No	Yes No
Are you treated as employed for tax purposes?	Yes No	Yes No
If Yes – annual salary	£	£
Bonus	£	£
Frequency	Annually Quarterly Monthly Four weekly Weekly	Annually Quarterly Monthly Four weekly Weekly
Overtime	<u>£</u>	£
Frequency	Annually Quarterly Monthly Four weekly Weekly	Annually Quarterly Monthly Four weekly Weekly
Commission	£	£
Frequency	Annually Quarterly Monthly Four weekly Weekly	Annually Quarterly Monthly Four weekly Weekly
If No - Net profit before tax latest period	<u>£</u>	£
If No - Net profit before tax previous period	<u>£</u>	£
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	Yes No	Yes No
Do you have a previous employer?	Yes No	Yes No
If Yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	<u>£</u>	£
Occupation		
Sole Trader (Self Employed)		
How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Net profit before tax - latest period	£	£
Net profit before tax - previous period	£	£
Partner (Self Employed)	Yes	Yes
How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Share of net profit before tax - latest period	£	£
Share of net profit before tax - previous period	£	£
Director / Shareholder with more than 20% shareholding	Yes	Yes
How long have you been trading?	Y Y M M	Y Y M M
Salary (including dividends) - latest period	£	£
Salary (including dividends) - previous period	£	£
Not employed	Yes	Yes
Retired	Yes	Yes
Student	Yes	Yes
Homemaker	Yes	Yes



Employment Details	Applicant 1	Applicant 2
Secondary Employment		
How are you employed? Occupation	Permanent Temporary Fixed term contract Sub contractor fixed to Sub contractor open ended Sole trader Partner Director 20% or less shareholding Director more than 20% shareholding Not employed Retired Student Homemaker	Sub contractor open ended Sole trader
Annual salary	£	f
Bonus	£	£
Frequency	Annually Quarterly Monthly Four weekly Weekly	Annually Quarterly Monthly Four weekly Weekly
Overtime	£	£
Frequency	Annually Quarterly Monthly Four weekly Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	<u>£</u>
Frequency	Annually Quarterly Monthly Four weekly Weekly	Annually Quarterly Monthly Four weekly Weekly
Time with current employer	YYM	M Y Y M M
If less than 1 year - are you in a probation period?	Yes No	Yes No
Do you have a previous employer?	Yes No	Yes No
If yes	Start date Y Y M	M Start date Y Y M M
	End date Y Y M	M End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	<u>£</u>	<u>f</u>
Occupation		
Fixed Term Contract		
How long have you been contracting?	Y Y M	M Y Y M M
What is the remaining term on current contract?	YYM	M Y Y M M
Contract likely to be renewed?	Yes No	Yes No
Time with current employer	YYM	M Y Y M M
If less than 1 year - are you in a probation period?	Yes No	Yes No
Do you have a previous employer?	Yes No	Yes No
If yes	Start date Y Y M	M Start date Y Y M M
	End date Y Y M	M End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	<u>£</u>	<u>f</u>
Occupation		
Sub Contractor Open Ended		
Are you treated as employed for tax purposes?	Yes No	Yes No
If Yes – annual salary	£	£
Bonus	£	<u>f</u>
Frequency	Annually Quarterly Monthly Four weekly Weekly	Annually Quarterly Monthly Four weekly Weekly
Overtime	£	<u>£</u>
Frequency	Annually Quarterly Monthly Four weekly Weekly	☐ Annually ☐ Quarterly ☐ Monthly ☐ Four weekly ☐ Weekly
Commission	£	£



rrequency	□ Annually □ Quarterly □ Monthly □ Four weekly □ Weekly	□ Annually □ Quarterly □ Monthly □ Four weekly □ Weekly
If No - Net profit before tax latest period	£	£
If No - Net profit before tax previous period	£	£
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	Yes No	Yes No
Do you have a previous employer?	Yes No	Yes No
If Yes	Start date Y Y M M	Start date Y Y M M
	End date Y Y M M	End date Y Y M M
How were you employed?		
Employment type		
Gross annual income	£	<u>£</u>
Occupation		
Sub Contractor Fixed Term		
How long have you been contracting?	Y Y M M	Y Y M M
What is the remaining term on current contract?	Y Y M M	Y Y M M
Current contract likely to be renewed?	Yes No	Yes No
Are you treated as employed for tax purposes?	Yes No	Yes No
If Yes – annual salary	£	£
Bonus	£	£
Frequency	Annually Quarterly Monthly	Annually Quarterly Monthly
	Four weekly Weekly	Four weekly Weekly
Overtime	£	£
Frequency	Annually Quarterly Monthly	Annually Quarterly Monthly
	Four weekly Weekly	Four weekly Weekly
Commission	£	£
Frequency	Annually Quarterly Monthly	Annually Quarterly Monthly
	☐ Four weekly ☐ Weekly	Four weekly Weekly
Sub Contractor Fixed Term (cont)	Applicant 1	Applicant 2
If No - Net profit before tax latest period	£	£
If No - Net profit before tax previous period	£	<u>f</u>
Time with current employer	Y Y M M	Y Y M M
If less than 1 year - are you in a probation period?	Yes No	Yes No
Do you have a previous employer?		
	Yes No Start date Y Y M M	Yes No Start date Y Y M M
If Yes	Start date Y Y M M End date Y Y M M	Start date Y Y M M End date Y Y M M
How were you employed?	Lilo date	Lilo date
Employment type		
Gross annual income	£	£
Occupation		-
Sole Trader (Self Employed)		
How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		
Net profit before tax - latest period	£	£
Net profit before tax - previous period	£	£
Partner (Self Employed)	Yes	Yes
How long have you been trading?	Y Y M M	Y Y M M
Have you become a partner in a professional practice?		-
Share of net profit before tax - latest period	£	£
Share of net profit before tax - previous period	£	£



Director / Shareholder with more than 20% shareholding	Yes	Yes
How long have you been trading?	Y Y M M	Y Y M M
Salary (including dividends) - latest period	£	£
Salary (including dividends) - previous period	£	£
Not employed	Yes	Yes
Retired	Yes	Yes
Student	Yes	Yes
Homemaker	Yes	Yes
Other Income (Monthly)	Applicant 1	Applicant 2
Do you have any other income?	Yes No	Yes No
Investment income	<u>£</u>	<u>£</u>
Maintenance income	<u>f</u>	£
Rental income from an unencumbered property	<u>£</u>	£
Pension income	£	£
Child Benefit	<u>£</u>	<u>£</u>
State Disability benefit	<u>f</u>	£
Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application.		
Universal credit/tax credit	£	£
Reduction in Income- are you aware of any changes to your income that is likely to affect your ability to meet your monthly mortgage repayment?		
If yes provide details		
Retirement Details	Applicant 1	Applicant 2
At what age do you plan to retire?		
If the term of the mortgage extends into the customer(s) retirement and retirement is within the next 10 years, please provide details of the retirement income.		
Annual investment income (including dividends)	£	£
Annual maintenance income	£	£
Annual rental income from an unencumbered property	£	£
Annual pension income (including annuities)	£	£
Annual Child Benefit	£	£
Annual State Disability benefit	£	£
Please tell the applicant their response may include sensitive information that we refer to as 'special category data', such as health related matters. We'll assume they're happy for us to record this information and we'll only use it to process their application.		
Annual universal credit/tax credits	£	<u>£</u>
Reduction in Income- are you aware of any changes to your income that is likely to affect your ability to meet your monthly mortgage repayment?		
If yes provide details		
Outgoings – Monthly Outgoings/Loans	Applicant 1	Applicant 2
Personal loans/hire purchase with more than 6 months to run	£	£
Total monthly payment for any personal loans/hire purchase being cleared on or before completion	£	£
Secured loans with more than 6 months to run	£	£
Total monthly payment for any secured loans being cleared on or before completion	£	£
Deferred purchase agreements with more than 6 months to run	£	£



Success to organize the property or any student boan before decided on the fore conjection of the conj	Total monthly payment for any deferred purchase agreements being cleared on or before completion	£	£
Second for the control propriet the control properties of the contro		<u>f</u>	£
Cisional Number Cisional N	Total monthly payment for any student loan		
Shool fees E E E CANA Maintenance E E CANA Maintenance E E E CANA Additional costs for financial idependants E E E CANA CARDIONAL CONTROL CONTRO			ŧ
CSA/Maintenance E C Additional costs of infancial dependents E C Outstanding Credit Card Balances Applicant 1 Applicant 2 Total outstanding credit Card Balances E E Credit card balances being cleaned on or before completion E E Increase in Outgoings Applicant 1 Applicant 2 Are you aware of any changes to your income that is likely a projument? Wes			
Electrone Elec			
Regular travel E			
Distanding Credit Card Balances			
Total outstanding credit card balances			
Ceretic card balances being cleared on or before completion	·		
Increase in Outgoings			
Are you aware of any changes to your income that is likely to affect your ability to meet your monthly mortgage	Credit card balances being cleared on or before completion	Ĺ	ž.
Ves	-	Applicant 1	Applicant 2
Annual Property Outgoings Applicant 1 Applicant 2 Enter details of cost associated with property you are buying E £ Council Tax £ £ Ground Rent £ £ Service Charge £ £ Building Insurance £ £ Shared Ownership Rent £ £ Existing Mortgage Details Applicant 1 Applicant 2 Which applicant is party to this mortgage? Yes No Yes No Existing Mortgage Details Applicant 2 £	to affect your ability to meet your monthly mortgage	Yes No	Yes No
Enter details of cost associated with property you are buying Council Tax £ £ Council Tax £ Council Tax £ Service Charge £ Building Insurance £ Shared Ownership Rent £ Existing Mortgage Details Applicant is party to this mortgage? ves	If yes provide details		
Vou are buying Council Tax £ Ground Rent £ Service Charge £ Service Charge £ Shared Ownership Rent £ Shared Ownership Rent £ Shared Ownership Rent £ Shared	Annual Property Outgoings	Applicant 1	Applicant 2
Service Charge			
Service Charge	Council Tax	£	£
Building Insurance £ £ £ Existing Mortage Details Applicant 1 Applicant 2 Which applicant is party to this mortgage?	Ground Rent	£	£
Existing Mortgage Details Applicant 1 Applicant 2 Which applicant is party to this mortgage? What is your current outstanding balance? Existing mortgage account number What is your current outstanding balance? Existing mortgage account number What is the balance that will be continuing? Existing mortgage account number What is the balance how much is interest only? Existing property let? Yes No Yes No Is there a tenancy agreement in place? What is the monthly mortgage repayment? Existing mortgage account number Which applicant is party to this mortgage? Yes No Whorts: Months: Wears: Months: Wars: Months: Warsing mortgage account number What is the balance that will be continuing? Existing lender name Existing mortgage account number What is the balance that will be continuing? Existing lender name Existing mortgage account number What is the balance that will be continuing? Existing lender name Existing mortgage account number What is the balance that will be continuing? Existing mortgage account number Existing mortgage repayment? Exist be property let? Yes No Yes No Yes No Yes No Yes No What is the monthly mortgage repayment? Exist be monthly mortgage repayment?	Service Charge	£	£
Existing Mortgage Details	Building Insurance	£	£
Which applicant is party to this mortgage? Existing lender name Existing mortgage account number What is your current outstanding balance? Existing mortgage account number What is your current outstanding balance? Existing mortgage account number What is the balance that will be continuing? Existing mortgage repayment? Existing mortgage repayment in place? Ferror outstanding balance, how much is interest only? Existing mortgage repayment? Existing mortgage account number What is the balance that will be continuing? Existing mortgage account number What is the balance that will be continuing? Existing mortgage account number Existing mortgage account number Existing mortgage account number What is the balance that will be continuing? Existing mortgage account number Existing mo	Shared Ownership Rent	£	£
Existing lender name Existing mortgage account number What is your current outstanding balance? £ What is the balance that will be continuing? £ Units continuing balance, how much is interest only? Existence a tenancy agreement in place? What is the monthly mortgage repayment? Existing Mortgage Term What is the monthly rental income? Existing mortgage account number What is your current outstanding balance? What is your current outstanding balance? What is the balance that will be continuing? Existing mortgage account number What is your current outstanding balance? Existing mortgage account number Existing mortgage account nu	Existing Mortgage Details	Applicant 1	Applicant 2
Existing lender name Existing mortgage account number What is your current outstanding balance? ### ### ### ### ### ### ### ### ### #	Which applicant is party to this mortgage?	Yes No	Yes No
Existing mortgage account number What is your current outstanding balance? £ £ £ What is the balance that will be continuing? £ Is the property let? Is the property let? What is the monthly mortgage repayment? £ Exemplify the monthly mortgage repayment? £ Remaining Mortgage Term What is party to this mortgage? What is party to this mortgage? What is the balance that will be continuing? Existing mortgage account number What is your current outstanding balance? What is the balance that will be continuing? £ £ £ £ Remaining Mortgage Term Wears: Months: Wears: Months: What is your current outstanding balance? Existing mortgage account number What is the balance that will be continuing? £ £ £ £ £ G What is the balance how much is interest only? £ £ £ £ Unit of this continuing balance, how much is interest only? £ St be property let? St be property let? St be monthly mortgage repayment? F EXISTING MORTHING MO	Existing lender name		
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Is the property let?	_	£	£
Is there a tenancy agreement in place? Yes No Yes No What is the monthly mortgage repayment? £ What is the monthly rental income? £ Remaining Mortgage Term Years: Months: Which applicant is party to this mortgage? Yes No Years: Months: Which applicant is party to this mortgage? Yes No Yes No Yes No Yes No Yes No What is your current outstanding balance? # What is the balance that will be continuing? £ Step of this continuing balance, how much is interest only? Is the property let? Is the property let? Yes No Y	Is the property let?	Yes No	Yes No
What is the monthly mortgage repayment? £ What is the monthly rental income? £ Remaining Mortgage Term Years: Months: Which applicant is party to this mortgage? What is party to this mortgage? Existing lender name Existing mortgage account number What is your current outstanding balance? £ £ £ £ # # # # # # # # #			
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Existing mortgage account number What is your current outstanding balance? £ What is the balance that will be continuing? £ Of this continuing balance, how much is interest only? Is the property let? Is there a tenancy agreement in place? What is the monthly mortgage repayment? £ What is the monthly rental income? £ £ £ £ £ £ # # # # # # #		Yes No	Yes No
What is your current outstanding balance? ### ### ### ### ### ### ### ### ### #			
What is the balance that will be continuing? £ Of this continuing balance, how much is interest only? £ Is the property let? Is there a tenancy agreement in place? What is the monthly mortgage repayment? £ What is the monthly rental income? £ £ £ £	Existing mortgage account number		
Of this continuing balance, how much is interest only? Is the property let? Is there a tenancy agreement in place? What is the monthly mortgage repayment? E		<u>£</u>	<u>£</u>
Is the property let? Is there a tenancy agreement in place? Yes No Yes No Yes No Yes No Yes No What is the monthly mortgage repayment? £ What is the monthly rental income? £ £			
Is there a tenancy agreement in place? Yes No Yes No Yes No What is the monthly mortgage repayment? ### ### ### ### ####################	Of this continuing balance, how much is interest only?	<u>£</u>	<u>£</u>
What is the monthly mortgage repayment? £ What is the monthly rental income? £ £ £	Is the property let?	Yes No	Yes No
What is the monthly rental income? £ £	Is there a tenancy agreement in place?	Yes No	Yes No
What is the monthly rental income? £ £	What is the monthly mortgage repayment?		£
·			
	•	Years: Months:	Years: Months:



11.

Which applicant is party to this mortgage?	Yes No	Yes No
Existing lender name		
Existing mortgage account number		
What is your current outstanding balance?	£	£
What is the balance that will be continuing?	£	£
Of this continuing balance, how much is interest only?	£	£
Is the property let?	Yes No	Yes No
Is there a tenancy agreement in place?	Yes No	Yes No
What is the monthly mortgage repayment?	£	£
What is the monthly rental income?	£	£
Remaining Mortgage Term	Years: Months:	Years: Months:
Existing Mortgage (Interest Only)	Applicant 1	Applicant 2
How have you chosen to repay your existing mortgage?	Repayment	Repayment
onstring moregoge.	Investment backed (interest only)	Investment backed (interest only)
	Part investment backed, part repayment	Part investment backed, part repayment
If part investment backed, what is the value of this part?		£
repay the capital element of the mortgage?	New ISA	New ISA
	New endowment policy	New endowment policy
	New pension plan	New pension plan
	Existing ISA	Existing ISA
	Existing endowment policy	Existing endowment policy
	Existing pension plan	Existing pension plan
		Sale of second property
		Sale of main residence
	<u>£</u>	£
Are all persons named on this repayment strategy also applicants for this borrowing application?	Yes No	Yes No
If the endowment/pension/ISA is linked, please list the policies to be used:	Policy provider:	Policy provider:
	Policy start date:	Policy start date:
	Policy maturity date:	Policy maturity date:
	Latest estimated maturity value: £	Latest estimated maturity value: £
	Monthly cost: £	Monthly cost: £
	Applicant 1	Applicant 2
Have you ever been bankrupt or entered into a voluntary agreement with a creditor in the last 6 years?	Yes No	Yes No
Details of bankruptcy or arrangements with creditors		
Have you ever had a county court judgement against you?	Yes No	Yes No
Have you ever had a county court judgement against you? Have you ever had a property repossessed?	Yes No	Yes No
, , , , , , , , , , , , , , , , , , , ,	Yes No	Yes No
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lea	Yes No	Yes No
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lead Product Selection All existing borrowing (i.e. the amount being ported) v	Yes No No No a soft footprint against the applicant(s) credit re vill be kept on the existing repayment type and if any p	Yes No ecord wart of it is on interest only you must have acceptable
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lead Product Selection All existing borrowing (i.e. the amount being ported) were payment vehicle(s) in place. All further borrowing means the second se	Yes No No No a soft footprint against the applicant(s) credit re vill be kept on the existing repayment type and if any p	Yes No ecord wart of it is on interest only you must have acceptable
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lead Product Selection All existing borrowing (i.e. the amount being ported) or repayment vehicle(s) in place. All further borrowing management of the product selection	Yes No No No a soft footprint against the applicant(s) credit re vill be kept on the existing repayment type and if any p ust be taken on a capital and interest repayment basis.	Yes No ecord wart of it is on interest only you must have acceptable
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lead Product Selection All existing borrowing (i.e. the amount being ported) were payment vehicle(s) in place. All further borrowing means the second se	Yes No No No a soft footprint against the applicant(s) credit re vill be kept on the existing repayment type and if any p	Yes No ecord wart of it is on interest only you must have acceptable
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lead Product Selection All existing borrowing (i.e. the amount being ported) or repayment vehicle(s) in place. All further borrowing management selection Product description Product term	Yes No No No a soft footprint against the applicant(s) credit re vill be kept on the existing repayment type and if any p ust be taken on a capital and interest repayment basis.	Yes No ecord wart of it is on interest only you must have acceptable
Have you ever had a property repossessed? Please be aware that a Decision In Principle will lead Product Selection All existing borrowing (i.e. the amount being ported) were payment vehicle(s) in place. All further borrowing meaningly product selection Product description	Yes No No No a soft footprint against the applicant(s) credit re vill be kept on the existing repayment type and if any p ust be taken on a capital and interest repayment basis. Fixed Tracker	Yes No ecord wart of it is on interest only you must have acceptable
	Existing mortgage account number What is your current outstanding balance? What is the balance that will be continuing? Of this continuing balance, how much is interest only? Is the property let? Is there a tenancy agreement in place? What is the monthly mortgage repayment? What is the monthly rental income? Remaining Mortgage Term Existing Mortgage (Interest Only) How have you chosen to repay your existing mortgage? If part investment backed, what is the value of this part? If investment backed (interest only), how do you intend to repay the capital element of the mortgage? Estimated second property value? Are all persons named on this repayment strategy also applicants for this borrowing application? If the endowment/pension/ISA is linked, please list the policies to be used: Credit Check Have you ever been bankrupt or entered into a voluntary agreement with a creditor in the last 6 years?	Existing mortgage account number What is your current outstanding balance? What is the balance that will be continuing? Is the property let? Is the property let? Is there a tenancy agreement in place? What is the monthly mortgage repayment? Existing Mortgage Term Years: Months: Existing Mortgage Term Years: Months: Existing Mortgage (Interest Only) How have you chosen to repay your existing mortgage? If part investment backed, what is the value of this part? If investment backed (interest only), how do you intend to repay the capital element of the mortgage? Estimated second property value? Are all persons named on this repayment strategy also applicants for this borrowing application? If the endowment/pension/ISA is linked, please list the policies to be used: Policy start date: Policy start date: Policy maturity value: £ Monthly cost: £ Credit Check Applicant 1 Applicant 1 Fellows ISA Policy start date: Policy maturity value: £ Monthly cost: £ Credit Check Applicant 1 Have you ever been bankrupt or entered into a voluntary agreement with a creditor in the last 6 years?



15.	Fee Payment	Booking Fee	
		Credit / Debit card details will be required for all	fees paid upfront
16.	Landlord / Letting Agent Details		
	Name		·
	Building name		
	Building number		
	Flat		
	Street		
	District		
	Town		
	County		
17.	Applicant's Contact Details	Applicant 1	Applicant 2
	What is the applicant's preferred method of contact?	Home Work Mobile Email	Home Work Mobile Email
	Home telephone number	Home Work Mobile Linaii	
	Work telephone number		<u> </u>
	Mobile phone number		
	Email address		
	Do you prefer contact through Typetalk?	□ Veg □ Ne	Ne
	Do you prefer to receive your	Yes No	Yes No
	correspondence in a special format?	None required Audio Large print Braille	None required Audio Large print Braille
	If the applicant prefers either Typetalk or special correspondence, please tell them we'll only use this information to help complete what they've asked us to do (which may also include sharing it with other organisations that act on our behalf).		
	Does the applicant(s) have a different correspondence to their current address?	Yes No	Yes No
	If yes – Building name		
	Building number		
	Flat		
	Street		
	District		
	Town		
	County		
	Postcode		
	Telephone number		
18.	Existing Mortgage Details Existing lender name		
	Existing mortgage account number		
		<u> </u>	<u> </u>
	Outstanding balance	£	- f
	Balance continuing	<u>f</u>	_ £
	Existing lender name		
	Existing mortgage account number		
	Outstanding balance	<u>£</u>	_ <u>£</u>
	Balance continuing	<u>£</u>	<u>£</u>



19.	Existing Personal Loans/ Hire Purchase	Applicant 1	Applicant 2
	Which applicant is party to this loan?		
	Lender name		
	Monthly payment	£	£
	Approximate balance	£	£
		Applicant 1	Applicant 2
	Which applicant is party to this loan?		
	Lender name		
	Monthly payment	£	£
	Approximate balance	<u>£</u>	<u>£</u>
20.	Existing Secured Loans	Applicant 1	Applicant 2
	Which applicant is party to this loan?		
	Lender name		
	Monthly payment	£	£
	Approximate balance	£	£
		Applicant 1	Applicant 2
	Which applicant is party to this loan?		
	Lender name		
	Monthly payment	£	£
	Approximate balance	£	£
21.	Existing Deferred Purchase Agreements	Applicant 1	Applicant 2
	Which applicant is party to this loan?		
	Lender name		
	Monthly payment	£	£
	Approximate balance	<u>£</u>	<u>£</u>
		Applicant 1	Applicant 2
	Which applicant is party to this loan?		
	Lender name		
	Monthly payment	<u>£</u>	<u>£</u>
	Approximate balance	<u>£</u>	<u>£</u>
22.	Existing Credit Card Balances	Applicant 1	Applicant 2
	Which applicant is party to this credit card?		
	Company name		
	Monthly payment	<u>£</u>	<u>£</u>
	Balance being cleared	<u>£</u>	<u>£</u>
		Applicant 1	Applicant 2
	Which applicant is party to this credit card?		
	Company name		
	Monthly payment	£	£
	Balance being cleared	£	£
23.	Employment Details	Applicant 1	Applicant 2
	Company/business name		
	Building number		
	Building name		
	Floor/unit/flat		
	Street Town		
	County		
	Postcode		
	i osicode		



Accountants Details	Applicant I		Applicant 2	
Name				
Telephone number				
E-mail address				
Building number				
Building name				
Floor/unit/flat				
Street				
Town			_	
County				
Postcode				
Secondary Employment details	Applicant 1		Applicant 2	
Company/business name				
Building number				
Building name				
Floor/unit/flat				
Street				
Town			_	
County				
Postcode	-			
Accountants Details	Applicant 1	,	Applicant 2	
Name			_	
Telephone number	-			
E-mail address				
Building number			_	
Building name			_	
Floor/unit/flat			_	
Street			_	
Town			_	
County				
Postcode				
Bank Details	,			
Bank details will be required for the payment of t	he mortgage			
Sort code				
Account number				
Date of payment Direct Debits are usually collect	ted on 1st of the month unles	ss you ask for a different day (2-	28).	
Details of property to be mortgaged (if not already co	ompleted in section 2)			
Is the mortgage for the applicants existing residence?	Yes No		Yes No	
House number				
House name				
Flat				
Street				
Town				
County				
Postcode				
Which area of the UK is the property in?		England & Wales	Northern Ireland	Scotland
Region of the security address e.g. South West, North Eas Greater London	st,			
Tenure	Freehold	Commonhold	Leasehold	Ownership Scotland
If Leasehold, how many years remaining on the lease?				
What will the new or extended term of the lease be at the	e time of completion?			



24.

25.

26.	Property Description								
	What is the property type?	Terraced house	Semi detached house	Detached	hou	se		Terraced b	ungalow
		Semi detached bungalow	Converted flat / mais	onette Purp	oose	built flat / ı	mais	sonette	
	What year was the property built?					Y		ΥΥ	
	Number of bedrooms								
	How many floors does the property have?								
	Purchase only – Is the property a new build, newly converte	ed or refurbished?				Yes		No	
	Does the property have a garage or parking space?					Yes		No	
	Does the property have a basement or cellar?					Yes		No	
	Is the property under construction or major redevelopment? (or due to be)					Yes		No	
	Is the property a listed building?					Yes		No	
	Is the property habitable?					Yes		No	
	Is the plot size greater than 1 acre?					Yes		No	
	If plot size is greater than 1 acre, will any of the land be used for business/ commercial/ agricultural purposes?					Yes		No	
	Is the property subject to any agricultural restrictions?					Yes		No	
	If plot size is greater than 1 acre please provide details of agricultural restrictions								
	Is the wall construction brick, block or stone?					Yes		No	
	Is the roof construction tile or slate?					Yes		No	
	Has the property been flooded in the last 5 years?					Yes		No	
	Is the property at risk of coastal or river erosion?					Yes		No	
	Has the property suffered from subsidence, heave or landslip?					Yes		No	
	Have significant structural alterations been made to the pro	operty that are not visible from t	he road?			Yes		No	
27.	Valuation Details								
	Please select the valuation type you require	Mortgage Valuation Report	Home Survey L	evel 2 Report		Transcript	(Sc	otland only)
	Please select the valuation type you require Mortgage Valuation Report Home Survey Level 2 Report Transcript (Scotland only) Credit / Debit card details may be required for payment of fees								
	Property Access Details (Details of Estate Agent or other)								
	Contact name								
	Estate Agent (if applicable)								-
	Primary Contact Number			1					
	Secondary Contact Number								
	Please provide any other information that might help us when booking the valuation or gaining access to the property								
	Property Access Address (Details of Property)								
	Building number								
	Flat								
	Building name								
	Street								
	Town								
	County								
	Postcode								
28.	Other Occupants Any persons aged 17 or over that will be living at the property on completion of this mortgage								
	Title								
	Forename								
	Surname								
	Title								
	Forename								
	Surname								
29.	Solicitor Details								



	Company name	,	
	Building number		
	Building name		
	Street		
	Town		
	County		
	Postcode		
	Acting solicitor name		
	Telephone number		
	Email address		
30.	Intermediary Requirements		
	Level of advice	Advice given	
	Will you be charging your client a fee?	Yes	□ No
	If yes – fee amount	£	
	Who is it payable to?		
	When is the fee payable?	Immediately	On application
	Is the fee refundable?	Yes	□ No
	Amount of fee to be refunded	£	110
	Percentage fee of be refunded		%
	When is the fee to be refunded		
	if the application does not proceed? Do you intend to pass any of the		
	procuration fee to the applicants?	Yes	No
	How much of the procuration fee is to be passed on?	£	
31.	Additional Information		
	Please provide any additional notes to support this application		
	Please tell the applicant their response may include		
	sensitive information that we refer to as 'special		
	category data', such as health related matters. We'll assume they're happy for us to record this information		
	and we'll only use it to process their application.		
		- <u></u>	

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