

Intermediary Mortgage Illustration enquiry form

Intermediary user ID

Payment Route

Level of service for this application	Advised	Execution only		
Level of service – execution only rationale	High net worth	Mortgage professional	Rejected advice	Non-interactive sale
Commission passed to applicant	None	Part	Full	

Intermediary fees

	Fee 1	Fee 2	Fee 3
Fee type			
Amount of fee	£	£	£
How much of the fee is refundable?	£	£	£
When payable	On application Within 14 days completion On cancellation On completion	On application Within 14 days completion On cancellation On completion	On application Within 14 days completion On cancellation On completion

Intermediary

Name of adviser
(inc. Title)

Fax number/ Telephone number

STD

STD

Company name

Address

Postcode

Company FCA registration number

E-mail

Customer details

Customer 1

Customer 2

Existing roll number

Title

Mr Mrs Miss Ms Dr Other Mr Mrs Miss Ms Dr Other

Full forename(s)

Surname

Note: The names written here must be identical to the names of the buyer(s) of the property, for example, if you hold or will hold the property in joint names, you should give both names. If there are more than two of you applying, then the details of the additional person(s) applying must be sent out on a separate sheet. Please tick if separate sheet attached.

Customer details (continued)

Customer 1

Customer 2

Date of birth
(DD/MM/YYYY)

Gender

Male Female

Male Female

Marital status

Married Single Separated
Widowed Divorced

Married Single Separated
Widowed Divorced

No. of dependent
children (if any)

Nationality

Country of residence

Previous name(s)

Current address

Postcode

Residential status

Mortgage free
Homeowner with a residential mortgage
Homeowner without a residential mortgage
Family/Friend
Renting private
Renting employer
Renting local authority

Mortgage free
Homeowner with a residential mortgage
Homeowner without a residential mortgage
Family/Friend
Renting private
Renting employer
Renting local authority

Home
telephone number

Daytime
telephone number

Mobile
telephone number

Fax number

E-mail

Preferred contact
method/time

Special need e.g. Braille,
large print, etc.

When did you move
to this address?
(DD/MM/YYYY)

If less than three
years, please provide
previous address

Postcode

Residential status
at this address

Customer details (continued)

Customer 1

Customer 2

Start date of residence
(DD/MM/YYYY)

End date of residence
(DD/MM/YYYY)

If total time at both addresses is less than three years, please give all previous addresses for the last three years on a separate sheet. If your correspondence address is different from that given by the first named applicant's present address, please give details on separate sheet. Please tick if separate sheet attached.

Loan details

Estimated purchase price/valuation £

Estimated amount of loan £

In what area are you looking to purchase a property?

Scotland & N Ireland	North	North West	East	South Wales & West	Greater London
South East	Midlands				

Purchase price of share (if shared ownership) £

Full market value (if Right to Buy) £

Customer type

Customer 1

Customer 2

First time buyer

Remortgage

First time buyer

Remortgage

Existing Borrower

Home mover

Existing Borrower

Home mover

Non residential owner

Remortgage own conveyancer

Non residential owner

Remortgage own conveyancer

Source of deposit (both applicants to complete)

Bank/Building Society account in own name

Salary

Sale of property

Inheritance

Family gift Other (please specify)

Multiple sources (please specify)

Product details

Provide breakdown of the mortgage required. Parts 2 and 3 are where multiple products, terms or repayment types are required.

Part 1

Part 2

Part 3

Product code (if known)

Type of product
e.g. fixed, tracker

Interest rate charged

Product term/end date

Loan amount £

£

£

Loan term (years)

Repayment type

Purpose

Existing Halifax mortgage account number (if porting)

Product details (continued)

What is your preferred payment date?

What fees are to be added to the loan and not paid within 30 days of completion?

	Product fees	Yes	No
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Interest only amount

Give details of new or existing plans or policies to be used with the interest only part of this mortgage

Bonus	Cash	Sale of Mortgaged Property	Endowments	Stocks & Shares ISA	Unit Trusts/ Open Ended Investment Companies (UK)	Investment Bonds	Stocks & Shares	Pensions	Sale of other residential property – Please also complete Interest only – Other residential property form for each property.	Total
£	£	£	£	£	£	£	£	£	£	£

If Sale of Mortgaged Property is to be used does the customer already have or intend to take out any other borrowing secured against the property with another lender?

Yes No If yes, please state amount £

Monthly premium

£ £ £ £ £ £ £ £ £ £ £

Reference/Account number

Maturity date for each repayment vehicle (For sale of residential property, provide date of intended sale)

Signature of Adviser

Date

DATA PRIVACY NOTICE

My information will be held by Bank of Scotland plc, which trades as Halifax, part of the Lloyds Banking Group. More information on the Group can be found at www.lloydsbankinggroup.com

My personal information will be shared within the Lloyds Banking Group to enable you to better understand my needs, run my accounts, and provide products in the efficient way that I expect.

You will share my personal information from my application with fraud prevention agencies. If false or inaccurate information is provided and fraud is identified, details of this fraud will be passed to these agencies to prevent fraud and money laundering. Further details explaining how information held by the fraud prevention agencies may be used can be obtained by reading the privacy notice at www.halifax.co.uk/securityandprivacy/privacy or contacting my local branch.

Where insurance on the property hasn't been arranged I understand you may pass relevant details to your chosen insurance provider for the purpose of providing a building/contents insurance quotation.

If I have taken advantage of your remortgage incentive, I understand you may need to pass my details to your chosen conveyancer so they can carry out the legal work.

You may obtain information about me from credit reference agencies and Group records to check my credit status. The credit reference agency enquiries may be seen by other companies making their own enquiries and may affect my ability to obtain credit elsewhere in the future. You may also use credit scoring.

If this is a joint application we are giving you permission to search and record information in respect of us both, and create a link between our financial records at credit reference agencies which will remain until we successfully apply for a "notice of disassociation" at these agencies.

You may ask me to provide physical forms of identity verification or search the files of credit reference agencies which will keep a record of your search, whether or not my application proceeds. This is not seen or used by lenders to assess my ability to obtain credit.

Lloyds Banking Group companies may use my information to contact me by mail, telephone, email or text message about products and services that may be of interest to me. If I do not wish to receive this information I can change my preferences at any time by calling you, writing to you, contacting my local branch or by updating them online.

To understand how the personal information I give you will be used, you strongly advise that I read your Privacy Statement. This can be found at www.halifax.co.uk/securityandprivacy/privacy or I can ask you for a copy. By continuing with this application, I agree to my personal information being used in the ways you describe. I will contact you if I have any questions.

Where my mortgage application has been taken by a broker, information regarding my application and valuation may be passed on to my broker.

If I apply for a mortgage, I agree that you can use my information in the ways described.