July 2025 v1.0

DATA CAPTURE BUY TO LET.

This is a data capture form only – all applications must be made using our Online Mortgage Application Service

NB The order of questions on this form follows the data capture order in our online portal.

INTERMEDIARY DETAILS

Intermediary Name	
Company Name	
FCA Status	Directly Authorised ☐ Appointed Representative ☐
FCA Number	
Registered Address	
Principal FCA Number/Name	/
Is sale advised?	Yes ☐ No ☐
How was the sale made?	Face to face ☐ Non face to face ☐
Name of Network	
Name of Mortgage Club	

PRE-REQUISITE QUESTIONS

Does the application meet the following minimum standards?	Tick boxes below	Notes
Has the applicant(s) previously been convicted of fraud, terrorism, organised crime, money laundering, arson or possession or supply of drugs?	Yes ☐ No ☐	
Is the property in Northern Ireland?	Yes ☐ No ☐	
Does the property require a stage build mortgage?	Yes ☐ No ☐	
Does the property meet the security criteria?	Yes ☐ No ☐	
Is this a Consumer BTL Application?	Yes ☐ No ☐	
Excluding Expat applications, do all applicants have a valid UK work visa or a statutory right to work in the UK?	Yes ☐ No ☐	
Do any of the applicants have Diplomatic Immunity?	Yes ☐ No ☐	
Have any of the applicants been party to a mortgaged property that has been repossessed in the last 6 years?	Yes ☐ No ☐	

LOAN DETAILS

Applicant Type	Individual ☐ Ltd Co. ☐
Loan Type	BTL ☐
Loan Purpose	Purchase ☐ Remortgage ☐
First time buyer?	Yes ☐ No ☐
Expat?	Yes ☐ No ☐
First-Time Landlord?	Yes ☐ No ☐
Will the property be occupied by the Applicants or a family member now or in the future?	Yes ☐ No ☐
Estimated Value/Purchase Price	£
Loan Amount	£
Anticipated Monthly Rental Income	£
Term	Years Months
Repayment Type	Interest Only ☐ Repayment ☐ Part & Part ☐
Interest Only Amount (if Part & Part)	£
Are any of the applicants a higher rate tax payer?	Yes ☐ No ☐
Product and Rate	

Repayment Strategy Summary

Repayment Strategy	Equity in the property	Current Value
Sale of Security Property	£	Not applicable
Sale of Other Property	£	Not applicable
Investments	Not applicable	£
Savings	Not applicable	£

SOURCE OF DEPOSIT

If purchase, please provide the source and amount of deposit

Savings	Sale of Existing Property	Sale of Shares/ Investments	Inheritance	Family Gifted Deposit	Equity Gifted Deposit	Builder Vendor Deposit	Personal/ Secured Loan	Capital raising from another property
£	£	£	£	£	£	£	£	£
Other (if other, please provide details)								

If remortgage, how are funds being used?								
Debt Consolidation	Repay Existing Mortgage	Home Improvements	Holiday	Car Purchase	Invest in / Purchase Business	Buy to Let Investment	Holiday Home	Purchase Equity
£	£	£	£	£	£	£	£	£
Other (if other, please provide details)								

Country of deposit	

LIMITED COMPANY BTL

Is this a Limited Company BTL? If so, please confirm Company Details.	
Limited Company Name	
Registered Number	
Trading Since	D D M M Y Y Y Y
Primary SIC Code	
Company Registered Office Address	
Company Correspondence Address	

APPLICANT DETAILS

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Title				
First Name				
Middle Name				
Surname				
Date of Birth	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y	D D M M Y Y Y Y
National Insurance Number				
Estimated Retirement Age				
Gender				
Nationality				

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Permanent Right to Reside in the UK	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Does the applicant require any of following Visas to work in the UK (Visas must have 6 months remaining at application)?*				
For how long has the applicant held a Visa to work in the UK	Years Months	Years Months	Years Months	Years Months
Length of Residency	Years Months	Years Months	Years Months	Years Months
Resident in the UK from birth	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Diplomatic Immunity	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Marital Status				
If any applicant has been known by another name in the last 6 years, please provide full details (including title)				

Limited Company app only				
Company Name				
Role within the Company				
% Shareholding				

CONTACT DETAILS

	Applicant 1	Applicant 2
Home Telephone Number		
Work Telephone Number		
Mobile Telephone Number		
Email Address		
Preferred method of contact		

	Applicant 3	Applicant 4
Home Telephone Number		
Work Telephone Number		
Mobile Telephone Number		
Email Address		
Preferred method of contact		

Keeping your client informed

The Mortgage Lender and its group of companies would like to keep your client informed of products, services, and member offers that we consider relevant to them. We will not share their information with external companies for the purpose of marketing.

To confirm whether or not your client wishes to be contacted by a particular method, please select 'Yes' or 'No' in the boxes below:

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Please contact by phone	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Please contact by mail	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Please contact by email	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Please contact by SMS	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐

CURRENT AND PREVIOUS ADDRESSES APP 1 & 2

		Applicant 1		Applicant 2	
Current Address	Address Line 1				
	Address Line 2				
	County				
	Postcode				
	Length of time at this address	Years	Months	Years	Months
	Residential Status at this address (choose one)	Owner with Mortgage	☐	Owner with Mortgage	☐
		Owner without Mortgage	☐	Owner without Mortgage	☐
		Renting – Private Landlord	☐	Renting – Private Landlord	☐
		Renting – Local Authority/ Social Landlord	☐	Renting – Local Authority/ Social Landlord	☐
		Renting – Letting Agent	☐	Renting – Letting Agent	☐
		Living with Relatives	☐	Living with Relatives	☐
		Living with Friends	☐	Living with Friends	☐

Previous Address	Address Line 1				
	Address Line 2				
	County				
	Postcode				
	Length of time at this address	Years	Months	Years	Months
	Residential Status at this address (choose one)	Owner with Mortgage	☐	Owner with Mortgage	☐
		Owner without Mortgage	☐	Owner without Mortgage	☐
		Renting – Private Landlord	☐	Renting – Private Landlord	☐
		Renting – Local Authority/ Social Landlord	☐	Renting – Local Authority/ Social Landlord	☐
		Renting – Letting Agent	☐	Renting – Letting Agent	☐
		Living with Relatives	☐	Living with Relatives	☐
		Living with Friends	☐	Living with Friends	☐

Previous Address			
	Address Line 1		
	Address Line 2		
	County		
	Postcode		
	Length of time at this address	Years Months	Years Months
	Residential Status at this address (choose one)	Owner with Mortgage ☐	Owner with Mortgage ☐
		Owner without Mortgage ☐	Owner without Mortgage ☐
		Renting – Private Landlord ☐	Renting – Private Landlord ☐
		Renting – Local Authority/ Social Landlord ☐	Renting – Local Authority/ Social Landlord ☐
		Renting – Letting Agent ☐	Renting – Letting Agent ☐
		Living with Relatives ☐	Living with Relatives ☐
		Living with Friends ☐	Living with Friends ☐
Additional Address Information			

Additional Notes:

CURRENT AND PREVIOUS ADDRESSES APP 3 & 4

		Applicant 1		Applicant 2	
Current Address	Address Line 1				
	Address Line 2				
	County				
	Postcode				
	Length of time at this address	Years Months		Years Months	
	Residential Status at this address (choose one)	Owner with Mortgage	☐	Owner with Mortgage	☐
		Owner without Mortgage	☐	Owner without Mortgage	☐
		Renting – Private Landlord	☐	Renting – Private Landlord	☐
		Renting – Local Authority/ Social Landlord	☐	Renting – Local Authority/ Social Landlord	☐
		Renting – Letting Agent	☐	Renting – Letting Agent	☐
		Living with Relatives	☐	Living with Relatives	☐
		Living with Friends	☐	Living with Friends	☐

Previous Address	Address Line 1				
	Address Line 2				
	County				
	Postcode				
	Length of time at this address	Years Months		Years Months	
	Residential Status at this address (choose one)	Owner with Mortgage	☐	Owner with Mortgage	☐
		Owner without Mortgage	☐	Owner without Mortgage	☐
		Renting – Private Landlord	☐	Renting – Private Landlord	☐
		Renting – Local Authority/ Social Landlord	☐	Renting – Local Authority/ Social Landlord	☐
		Renting – Letting Agent	☐	Renting – Letting Agent	☐
		Living with Relatives	☐	Living with Relatives	☐
		Living with Friends	☐	Living with Friends	☐

Previous Address			
	Address Line 1		
	Address Line 2		
	County		
	Postcode		
	Length of time at this address	Years Months	Years Months
	Residential Status at this address (choose one)	Owner with Mortgage ☐	Owner with Mortgage ☐
		Owner without Mortgage ☐	Owner without Mortgage ☐
		Renting – Private Landlord ☐	Renting – Private Landlord ☐
		Renting – Local Authority/ Social Landlord ☐	Renting – Local Authority/ Social Landlord ☐
		Renting – Letting Agent ☐	Renting – Letting Agent ☐
		Living with Relatives ☐	Living with Relatives ☐
		Living with Friends ☐	Living with Friends ☐
Additional Address Information			

Additional Notes:

VULNERABILITIES

There are many circumstances that mean customers would like us to support them differently today, in the future, or on an ongoing basis. If they share this information with us, we'll take the time to understand their needs and work with you and them to support those needs.

We will also use the information provided to help us develop our products and support options to help improve outcomes for all our customers. No data which will identify your client will be used in these circumstances.

Characteristics of vulnerability disclosed will not be used to determine whether or not a loan can be granted.

Does the applicant have any vulnerable characteristics that may require additional support from The Mortgage Lender?	Yes ☐ No ☐ Prefer not to say ☐
Does the applicant consent to disclosing this vulnerable characteristic to The Mortgage Lender?	Yes ☐ No ☐
Details	

SPECIAL REQUIREMENTS

Does the applicant require printed communication in a different format?	Yes ☐ No ☐
Please select required format, if applicable	Braille ☐ Audio ☐ Large Print ☐

EMPLOYMENT

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Employed Occupation & Income				
Is the applicant a Basic rate tax payer only?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Full-time?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Occupation				
Start date of employment	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y
Basic salary	£	£	£	£
Overtime	£	£	£	£
Commission	£	£	£	£
Bonus	£	£	£	£
Car Allowance	£	£	£	£
Other Allowances	£	£	£	£
Does the applicant have any deductions from their salary?				
Student Loan	£	£	£	£
Pension	£	£	£	£
Other Deductions	£	£	£	£

Secondary Income (Employed)				
Full-time?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Occupation				
Start date of employment	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y
Basic salary	£	£	£	£
Overtime	£	£	£	£
Commission	£	£	£	£
Bonus	£	£	£	£
Car Allowance	£	£	£	£
Other Allowances	£	£	£	£
Does the applicant have any deductions from their salary?				
Student Loan	£	£	£	£
Pension	£	£	£	£
Other Deductions	£	£	£	£

Secondary Income (Contract)				
Employment Status				
More than 25% share owner or Partner with less than 4 Partners in the firm?				
Full-time?				
Fixed-contract?				
Has contract been previously renewed?				
Will contract be renewed or has alternative been secured?				

Primary Self-Employment – please provide your confirmed income for at least 1 years (please provide 2 years of confirmed income if available)				
Ownership Type				
Occupation				
Industry				
Date Commenced Trading	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y
Percentage of Business Owned				
SA302 Income OR Directors Salary	£	£	£	£
Year Ending	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y
Share of profit before tax				
Year Ending	Y Y Y Y	Y Y Y Y	Y Y Y Y	Y Y Y Y

Secondary Self-Employment – please provide your confirmed income for at least 1 years (please provide 2 years of confirmed income if available)				
Ownership Type				
Occupation				
Industry				
Date Commenced Trading	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y
Percentage of Business Owned				
SA302 Income OR Directors Salary	£	£	£	£
Year Ending	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y	M M Y Y Y Y
Share of profit before tax				
Year Ending	Y Y Y Y	Y Y Y Y	Y Y Y Y	Y Y Y Y

OTHER SOURCES OF INCOME

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Investment	£	£	£	£
Dividends/Drawings	£	£	£	£
Pension (Private)	£	£	£	£
Pension (Company)	£	£	£	£
Pension (State)	£	£	£	£
Maintenance	£	£	£	£
Other	£	£	£	£

INCOME CHANGES

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Do the applicants foresee any changes in the level of their income or expenditure which may affect their ability to meet mortgage repayments?				
If yes, please provide details				

Current Employment Contact Details	Applicant 1	Applicant 2
Company Name		
Address 1		
Address 2		
Address 3		
Postcode		
Telephone Number		
Employed by a family member?	Yes ☐ No ☐	Yes ☐ No ☐

Current Employment Contact Details	Applicant 3	Applicant 4
Company Name		
Address 1		
Address 2		
Address 3		
Postcode		
Telephone Number		
Employed by a family member?	Yes ☐ No ☐	Yes ☐ No ☐

Self-Employment Contact Details	Applicant 1	Applicant 2
Company Name		
Telephone Number		
Address Line 1		
Address Line 2		
Address Line 3		
Postcode		
Accountant used to prepare accounts?	Yes ☐ No ☐	Yes ☐ No ☐
Accountant Company		
Accountant Contact Name		
Accountant Qualification		
How long has the Accountant acted for the applicant?	Years Months	Years Months
Accountant Address		
Address Line 1		
Address Line 2		
Address Line 3		
Postcode		

Self-Employment Contact Details	Applicant 1	Applicant 2
Company Name		
Telephone Number		
Address Line 1		
Address Line 2		
Address Line 3		
Postcode		
Accountant used to prepare accounts?	Yes ☐ No ☐	Yes ☐ No ☐
Accountant Company		
Accountant Contact Name		
Accountant Qualification		
How long has the Accountant acted for the applicant?	Years Months	Years Months
Accountant Address		
Address Line 1		
Address Line 2		
Address Line 3		
Postcode		

COMMITMENTS

Credit Commitments for joint applicants – if mortgages or other commitments are shared the information should be given only once		
Monthly Rental Commitment (if applicable)	£	£
Current Residential Mortgages		
To be redeemed on completion	Yes ☐ No ☐	Yes ☐ No ☐
Reasons for not redeeming on completion		
Property to be let	Yes ☐ No ☐	Yes ☐ No ☐
Property Unencumbered	Yes ☐ No ☐	Yes ☐ No ☐
Other (provide details)		
Monthly residential mortgage repayment	£	£
Residential mortgage balance outstanding	£	£
Estimated value of current residential property	£	£
Current mortgage lender		
Account number		

Mortgage & Secured Loan History		
Does the applicant have any other Mortgages or Secured Loans (not BTL)?	Yes ☐ No ☐	Yes ☐ No ☐
Outstanding Balance (for each loan)	£	£
Monthly Payment (for each loan)	£	£
End Date (for each loan)	M M Y Y Y Y	M M Y Y Y Y
Repay on Completion	Yes ☐ No ☐	Yes ☐ No ☐

Store/Credit Cards

Applicant	Card Provider	Last 4 digits of card number	Balance	To be repaid on completion?	Sources of funds for repayment
			£	Yes ☐ No ☐	
			£	Yes ☐ No ☐	
			£	Yes ☐ No ☐	

Loan & Hire Purchase

Applicant	Lender	Account No	Balance	Monthly Payments	End Date (mm/yy)	To be repaid on completion?	Sources of funds for repayment
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	

Mail Order accounts

Applicant	Lender	Account No	Balance	Monthly Payments	End Date (mm/yy)	To be repaid on completion?	Sources of funds for repayment
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	

Debt management plans

Applicant	Lender	Account No	Balance	Monthly Payments	End Date (mm/yy)	To be repaid on completion?	Sources of funds for repayment
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	

Other commitments (non-lifestyle)

	Applicant 1		Applicant 2	
Commitment type	Monthly payment	End date	Monthly payment	End date
Maintenance/Alimony	£	M M Y Y Y Y	£	M M Y Y Y Y
School Fees	£	M M Y Y Y Y	£	M M Y Y Y Y
Child Care	£	M M Y Y Y Y	£	M M Y Y Y Y
Court Fines	£	M M Y Y Y Y	£	M M Y Y Y Y
Ground Rent Charges	£	M M Y Y Y Y	£	M M Y Y Y Y

BTL PORTFOLIO

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Does the applicant own any investment/ buy-to-let properties?				
Total number of properties				
Estimated value of portfolio	£	£	£	£
Total outstanding balance of mortgages	£	£	£	£
Total monthly portfolio rental income	£	£	£	£
Total monthly portfolio mortgage payments	£	£	£	£
Is the portfolio managed by an agent on the applicant's behalf?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐

HOUSEHOLD EXPENDITURE

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Household details for all Applicants				
Number of Households				
Dependants for all applications				
Number of non-applicant dependants				
Child dependants aged under 5				
Child dependants aged 5 to 18				

PROPERTY DETAILS

Property Address	
Address Line 1	
Address Line 2	
Address Line 3	
County	
Postcode	

Property Description

House ☐	Bungalow ☐	Flat ☐	Studio Flat ☐	Maisonette ☐	Other ☐

Property Type

Detached ☐	Semi-detached ☐	End Terraced ☐	Mid Terraced ☐	Back to Back ☐	Other ☐

Is property a new build?	Yes ☐ No ☐
Year of construction	M M Y Y Y Y
Is the property inherited?	Yes ☐ No ☐
Period of time property rented?	Years Months
Has the applicant lived in the property in the last 24 months?	Yes ☐ No ☐

Certificate Type (if less than 10 years old)

NHBC ☐	Zurich Municipal ☐	Building Life Plan Scheme ☐	Premier Guarantee ☐	Architects Certificate ☐	No Warranty ☐
Other ☐					

Rooms

No. of Bedrooms	No. of Bathrooms	No. of Kitchens

Tenure

Freehold ☐	Leasehold ☐	Commonhold ☐	Heritable ☐
Years remaining on lease (if applicable)			

Type of Sale (purchase only)						
Private ☐	Purchase from Local Authority ☐	Purchase from Housing Association ☐	Purchase at Auction ☐	Purchase from Landlord as Tenant ☐	Purchase from Builder ☐	Purchase from Relative ☐

Number of storeys in building (Flats/Apartments)			
Floor number of flat (Flats/Apartments)			
Does property have a lift?			Yes ☐ No ☐
Is the property connected to or above a commercial property? (If yes, please provide details)	Yes ☐	Details	No ☐
Is any of the property to be used for commercial purposes? (If yes, for what type of business?)	Yes ☐	Details	No ☐
Standard construction?	Yes ☐	Details	No ☐
Is the property ex-social housing?			Yes ☐ No ☐
Does the property include more than three acres of land?			Yes ☐ No ☐
What is the occupancy type?	Standard ☐ Multi-Unit Block ☐		HMO ☐ Holiday & Short-term Let ☐
How many units are in the Multi-Unit Block? (if applicable)			
Is the property currently let?			Yes ☐ No ☐
EPC Rating			

PROPERTY ACCESS

Arrangements for Property Access	
Provide details for the valuer to gain access to inspect the property:	
Contact Name	
Contact Type (Applicant, Builder, Vendor)	
Telephone Number	
Email address	
Any additional access information	

CONVICTIONS

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Do the applicants have any criminal convictions other than those which are spent under the Rehabilitation of Offenders Act 1974 (or equivalent), or any pending prosecutions relation to any aspect of dishonesty, such as theft, robbery, fraud, or arson; which may have bearing on your future employment or likely conduct of the mortgage?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐

SOLICITOR DETAILS

Does the applicant wish to use The Mortgage Lender appointed solicitor? If no, please provide the applicant's solicitor details below.	Yes ☐ No ☐
Solicitor's Firm Name	
Solicitor's Name	
Address Line 1	
Address Line 2	
Postcode	
Contact Telephone Number	
Fax Number	
Email Address	
DX Number	

BANK DETAILS

Customer Direct Debit Details	
Direct Debit declaration accepted?	
Bank Sort Code	– –
Account Number	
Account Holder Name	
Bank Name	
Bank Address	
Address Line 1	
Address Line 2	
Address Line 3	
Post Code	

FEES

TML Fees	
Added or Deducted from Loan?	
Completion Fee	Added ☐ Deducted ☐
Telegraphic Transfer Fee	Added ☐ Deducted ☐

Other Fees

Fee Description	Fee Amount	How Payable	When Payable	Refundable Amount
	£			£
	£			£
	£			£
	£			£
	£			£
	£			£

ADDITIONAL NOTES

THANKS
FOR YOUR TIME.