

Intermediary mortgage data capture form.



Submit your client's mortgage application online: www.halifax-intermediaries.co.uk

Number of applicants	<input type="text"/>			
Is this a remortgage?	<input type="radio"/> Yes	<input type="radio"/> No		
Do you require a mortgage Illustration from Halifax?	<input type="radio"/> Yes	<input type="radio"/> No		
Level of service for this application	<input type="radio"/> Advised	<input type="radio"/> Execution only		
Level of service – execution only rationale	<input type="radio"/> High net worth	<input type="radio"/> Mortgage professional	<input type="radio"/> Rejected advice	<input type="radio"/> Non-interactive sale

Intermediary fees

	Fee 1	Fee 2	Fee 3
Fee type	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount of fee	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
How much of the fee is refundable?	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
When payable	<input type="radio"/> On application <input type="radio"/> Within 14 days completion <input type="radio"/> On cancellation <input type="radio"/> On completion	<input type="radio"/> On application <input type="radio"/> Within 14 days completion <input type="radio"/> On cancellation <input type="radio"/> On completion	<input type="radio"/> On application <input type="radio"/> Within 14 days completion <input type="radio"/> On cancellation <input type="radio"/> On completion

Intermediary details

Company name	<input type="text"/>
Intermediary name	<input type="text"/>
Intermediary panel number (if known)	<input type="text"/>
Preferred contact number	<input type="text"/>
E-mail address	<input type="text"/>

Personal details

	Applicant 1	Applicant 2
	<input type="radio"/> Mr <input type="radio"/> Mrs <input type="radio"/> Miss <input type="radio"/> Ms <input type="radio"/> Dr <input type="radio"/> Other	<input type="radio"/> Mr <input type="radio"/> Mrs <input type="radio"/> Miss <input type="radio"/> Ms <input type="radio"/> Dr <input type="radio"/> Other
Forename 1 – as shown on id	<input type="text"/>	<input type="text"/>
Forename 2 – as shown on id (if applicable)	<input type="text"/>	<input type="text"/>
Forename 3 – as shown on id (if applicable)	<input type="text"/>	<input type="text"/>

Personal details (continued)

	Applicant 1	Applicant 2
Surname	<input type="text"/>	<input type="text"/>
Gender	<input type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female
Date of birth (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Marital status	<input type="radio"/> Married/Civil partnership <input type="radio"/> Single <input type="radio"/> Separated <input type="radio"/> Widowed <input type="radio"/> Divorced/Dissolved/civil partnership	<input type="radio"/> Married/Civil partnership <input type="radio"/> Single <input type="radio"/> Separated <input type="radio"/> Widowed <input type="radio"/> Divorced/Dissolved/civil partnership
Has your name ever changed?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Date of name change (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Previous first name	<input type="text"/>	<input type="text"/>
Previous middle name	<input type="text"/>	<input type="text"/>
Previous surname	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>	<input type="text"/>
Dual nationality	<input type="text"/>	<input type="text"/>
Country of residence	<input type="text"/>	<input type="text"/>
Do you have diplomatic immunity?*	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
*Halifax do not accept applications where the customer benefits from diplomatic immunity.		
Work telephone number	STD <input type="text"/> <input type="text"/>	STD <input type="text"/> <input type="text"/>
Home telephone number	STD <input type="text"/> <input type="text"/>	STD <input type="text"/> <input type="text"/>
Mobile number	STD <input type="text"/> <input type="text"/>	STD <input type="text"/> <input type="text"/>
Preferred contact number	<input type="radio"/> Work <input type="radio"/> Home <input type="radio"/> Mobile	<input type="radio"/> Work <input type="radio"/> Home <input type="radio"/> Mobile
Home email address	<input type="text"/>	<input type="text"/>
Work email address	<input type="text"/>	<input type="text"/>
Special needs	<input type="radio"/> Large print <input type="radio"/> Braille <input type="radio"/> Audio text	<input type="radio"/> Large print <input type="radio"/> Braille <input type="radio"/> Audio text
Current address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Has your address changed in the last 3 years?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Date moved into current address (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>

Customer information

	Applicant 1	Applicant 2
Customer type	<input type="radio"/> First time buyer <input type="radio"/> Existing Halifax borrower <input type="radio"/> Home mover <input type="radio"/> Remortgage <input type="radio"/> Remortgage – own conveyancer	<input type="radio"/> First time buyer <input type="radio"/> Existing Halifax borrower <input type="radio"/> Home mover <input type="radio"/> Remortgage <input type="radio"/> Remortgage – own conveyancer
Will the existing mortgage be repaid within one month of completion?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Residential status	<input type="radio"/> Renting <input type="radio"/> Home owner – mortgage <input type="radio"/> Family/Friend <input type="radio"/> Home owner – mortgage free	<input type="radio"/> Renting <input type="radio"/> Home owner – mortgage <input type="radio"/> Family/Friend <input type="radio"/> Home owner – mortgage free
First previous address in last 3 years	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Date moved into previous address (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Date moved out of previous address (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Residential status	<input type="radio"/> Home owner – mortgage <input type="radio"/> Renting <input type="radio"/> Home owner – mortgage free <input type="radio"/> Family/Friend	<input type="radio"/> Home owner – mortgage <input type="radio"/> Renting <input type="radio"/> Home owner – mortgage free <input type="radio"/> Family/Friend
Second previous address in last 3 years	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Date moved into previous address (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Date moved out of previous address (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Residential status	<input type="radio"/> Home owner – mortgage <input type="radio"/> Renting <input type="radio"/> Home owner – mortgage free <input type="radio"/> Family/Friend	<input type="radio"/> Home owner – mortgage <input type="radio"/> Renting <input type="radio"/> Home owner – mortgage free <input type="radio"/> Family/Friend

Money laundering

	Applicant 1	Applicant 2
Was the verification taken?	<input type="radio"/> Face to face <input type="radio"/> Non face to face	<input type="radio"/> Face to face <input type="radio"/> Non face to face

Applicant identification

Type of standard verification provided	<input type="text"/>	<input type="text"/>
Document reference	<input type="text"/>	<input type="text"/>
Date of issue (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Issuing office/organisation	<input type="text"/>	<input type="text"/>
Type of secondary verification provided	<input type="text"/>	<input type="text"/>
Document reference	<input type="text"/>	<input type="text"/>

Employment details

	Applicant 1	Applicant 2
Number of jobs per applicant	<input type="text"/>	<input type="text"/>
What type of occupation are you in? e.g. Sales, office, professional, trades	<input type="text"/>	<input type="text"/>
Employment type	<input type="radio"/> PAYE <input type="radio"/> Self employed	<input type="radio"/> PAYE <input type="radio"/> Self employed
Contract type	<input type="radio"/> Permanent <input type="radio"/> Piecework <input type="radio"/> Seasonal/Temp <input type="radio"/> Agency	<input type="radio"/> Probationary <input type="radio"/> Sub-contract <input type="radio"/> Fixed/Short term <input type="radio"/> Agency
Start date of employment (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Percentage of business owned	<input type="text"/> %	<input type="text"/> %
Anticipated age of retirement	<input type="text"/>	<input type="text"/>
Type of anticipated retirement annual income	<input type="text"/>	<input type="text"/>
Anticipated retirement annual income	£ <input type="text"/>	£ <input type="text"/>
Frequency of anticipated retirement annual income	<input type="text"/>	<input type="text"/>
Type of anticipated retirement annual income	<input type="text"/>	<input type="text"/>
Anticipated retirement annual income	£ <input type="text"/>	£ <input type="text"/>
Frequency of anticipated retirement annual income	<input type="text"/>	<input type="text"/>
Name of employer/business	<input type="text"/>	<input type="text"/>
Employer's/business address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Employer's/business telephone number	STD <input type="text"/> <input type="text"/>	STD <input type="text"/> <input type="text"/>
Employer's/business fax number	STD <input type="text"/> <input type="text"/>	STD <input type="text"/> <input type="text"/>
Do you have income from any other sources?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
(If 'Yes', please complete the 'Other income' section on page 7.)		
Salary currently paid into a current account held with Halifax, Lloyds Bank or Bank of Scotland?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Income

	Applicant 1	Can income be verified?	Applicant 2	Can income be verified?
Gross basic salary	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
Annual commission	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
Annual bonus	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
Annual overtime	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	£ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No

If self-employed

Latest year

	Applicant 1	Applicant 2
Year end date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Turnover (£)	£ <input type="text"/>	£ <input type="text"/>
Gross profit (£)	£ <input type="text"/>	£ <input type="text"/>
Net profit (£)	£ <input type="text"/>	£ <input type="text"/>
Assets (£)	£ <input type="text"/>	£ <input type="text"/>
Liabilities (£)	£ <input type="text"/>	£ <input type="text"/>

Previous year

	Applicant 1	Applicant 2
Year end date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Turnover (£)	£ <input type="text"/>	£ <input type="text"/>
Gross profit (£)	£ <input type="text"/>	£ <input type="text"/>
Net profit (£)	£ <input type="text"/>	£ <input type="text"/>
Assets (£)	£ <input type="text"/>	£ <input type="text"/>
Liabilities (£)	£ <input type="text"/>	£ <input type="text"/>

2nd previous year

	Applicant 1	Applicant 2
Year end date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Turnover (£)	£ <input type="text"/>	£ <input type="text"/>
Gross profit (£)	£ <input type="text"/>	£ <input type="text"/>
Net profit (£)	£ <input type="text"/>	£ <input type="text"/>
Assets (£)	£ <input type="text"/>	£ <input type="text"/>
Liabilities (£)	£ <input type="text"/>	£ <input type="text"/>

Income (continued)

Projected year

	Applicant 1	Applicant 2
Year end date (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Turnover (£)	£ <input type="text"/>	£ <input type="text"/>
Gross profit (£)	£ <input type="text"/>	£ <input type="text"/>
Net profit (£)	£ <input type="text"/>	£ <input type="text"/>
Assets (£)	£ <input type="text"/>	£ <input type="text"/>
Liabilities (£)	£ <input type="text"/>	£ <input type="text"/>
What year did you acquire an interest in the business? (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
In what year was the business established? (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
Does the business have accounts?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of accountant's firm	<input type="text"/>	<input type="text"/>
Accountant's address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Accountant's telephone number	STD <input type="text"/> <input type="text"/>	STD <input type="text"/> <input type="text"/>
Name of previous employer/business	<input type="text"/>	<input type="text"/>
Previous employer's/business address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Previous employer's/business telephone number	<input type="text"/>	<input type="text"/>
Previous employer's/business fax number	<input type="text"/>	<input type="text"/>
What type of employment was this? e.g. Sales, office, professional, trades	<input type="text"/>	<input type="text"/>
Start date of employment (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>
End date of employment (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>

(If total employment history is still less than 18 months, please complete section 2 on page 14.)

Other income

	Applicant 1	Applicant 2
What type of income is this?	<input type="text"/>	<input type="text"/>
Annual amount (£)	£ <input type="text"/>	£ <input type="text"/>
What type of income is this?	<input type="text"/>	<input type="text"/>
Annual amount (£)	£ <input type="text"/>	£ <input type="text"/>

Scheme(s) required

- | | | |
|--|---|---|
| <input type="radio"/> Right to buy | <input type="radio"/> Second home loan | <input type="radio"/> Shared equity |
| <input type="radio"/> Shared ownership | <input type="radio"/> New buy/MI new home | <input type="radio"/> Homebuyer special |

Shared equity

What equity stake will be held by the customer?	<input type="text"/> %
Monthly interest payments	£ <input type="text"/>

Shared ownership

What percentage share will be purchased?	<input type="text"/> %
Monthly rental commitments	£ <input type="text"/>
Name of shared ownership company	<input type="text"/>

Loan details

Purchase price/valuation	£ <input type="text"/>
Market value (right to buy)	£ <input type="text"/>
Cost of improvements	£ <input type="text"/>
Loan amount	£ <input type="text"/>
Total value of cash incentives	£ <input type="text"/>
Total value of outstanding mortgages with Lloyds Banking Group	£ <input type="text"/>

- | | | | |
|-------------------|--------------------------------------|-------------------------------------|--|
| Source of deposit | <input type="radio"/> Builder/Seller | <input type="radio"/> Concessionary | <input type="radio"/> Equity |
| | <input type="radio"/> Gift | <input type="radio"/> Homebuy | <input type="radio"/> Housing Assoc or RSL |
| | <input type="radio"/> Loan | <input type="radio"/> Savings | <input type="radio"/> Tenants Incentive Scheme |
| | <input type="radio"/> None | | |

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)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Type of product e.g. fixed, tracker	<input type="text"/>	<input type="text"/>	<input type="text"/>
Interest rate charged	<input type="text"/>	<input type="text"/>	<input type="text"/>
Product term/end date	<input type="text"/>	<input type="text"/>	<input type="text"/>
Loan amount	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Loan term (years)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Repayment type	<input type="text"/>	<input type="text"/>	<input type="text"/>
Purpose	<input type="text"/>	<input type="text"/>	<input type="text"/>
Existing Halifax mortgage account number (if porting)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is product fee to be paid up front?	<input type="radio"/> Yes <input type="radio"/> No		
What is your preferred payment date? (DD/MM/YYYY)	<input type="text"/>		

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
Monthly premium										
£ <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"/>	£ <input type="text"/>
Reference/Account number										
<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"/>	<input type="text"/>
Maturity date for each repayment vehicle (For sale of residential property, provide date of intended sale)										
<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"/>	<input type="text"/>
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?										
<input type="radio"/> Yes <input type="radio"/> No If yes, please state amount: £ <input type="text"/>										

Personal finances (both applicants)

	Applicant 1	Applicant 2
Time with bank	Years <input type="text"/>	Years <input type="text"/>
	Months <input type="text"/>	Months <input type="text"/>
How many dependent children do you have?	<input type="text"/>	
How many dependent adults do you have?	<input type="text"/>	

(these include Switch/Visa Debit card, Visa/MasterCard, Annex/Diners card, store cards, other cards, current accounts, bank loans, other loans, savings accounts, school fees, child care, student loans and second home running costs)

Type of commitment

Commitment 1	Commitment 2	Commitment 3	Commitment 4	Commitment 5
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Whose name is commitment in?

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Name of lender/company

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Commitment 1	Commitment 2	Commitment 3	Commitment 4	Commitment 5
Monthly repayment				
£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

Balance outstanding				
£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

End date of loan (DD/MM/YYYY)				
£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

Number of months in arrears				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Will this be repaid on completion in full?

<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
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If yes, source of funds to repay

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Total monthly maintenance payments

£

For mortgage commitments only, complete the information below:

Mortgage type

Personal finances (both applicants) (continued)

Remaining term	<input type="text"/>
Repayment type	<input type="text"/>
Name of lender/company	<input type="text"/>
Monthly repayment	£ <input type="text"/>
Balance outstanding	£ <input type="text"/>
End date of loan (DD/MM/YYYY)	<input type="text"/>
Current months in arrears	<input type="text"/>
Intend to repay on completion	<input type="radio"/> Yes <input type="radio"/> No
Source of repayment	<input type="text"/>
Second home monthly running costs	£ <input type="text"/>

If you have additional mortgage commitments complete section 3 on page 15.

Have any future known changes to income/expenditure been taken into account? ☐ Yes ☐ No

Property

Has any applicant been in arrears in the last six years with any borrowing or ever had a property repossessed?	<input type="radio"/> Yes	<input type="radio"/> No
Has any applicant had a County Court Judgment (CCJ) or default registered against them or if self-employed against their business within the last 6 years?	<input type="radio"/> Yes	<input type="radio"/> No
Has any applicant been declared bankrupt, entered into an IVA or debt relief order within the last six years or still have an outstanding bankruptcy restriction order?	<input type="radio"/> Yes	<input type="radio"/> No

Property information

Postal address of the property	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>

Financial history

What type of property is this	<input type="radio"/> House	<input type="radio"/> Semi detached	<input type="radio"/> Bungalow
	<input type="radio"/> Converted flat	<input type="radio"/> Purpose built flat	<input type="radio"/> Detached
	<input type="radio"/> End terrace	<input type="radio"/> Mid terrace	<input type="radio"/> Other
Number of bedrooms	<input type="text"/>		
If the property is a flat, number of floors in the block	<input type="text"/>		
Which floor is the flat on?	<input type="text"/>		
Purchase type	<input type="radio"/> Normal	<input type="radio"/> Sitting tenant	<input type="radio"/> Inheritance
	<input type="radio"/> Gift	<input type="radio"/> Other	<input type="radio"/> Local authority
Was the property built in the last 12 months?	<input type="radio"/> Yes	<input type="radio"/> No	
Year property built	<input type="text"/>		

Property information (continued)

Property to be occupied for the first time in its current state?

☐ Yes ☐ No

Builder's name

If a new property is being purchased, please confirm the building standards indemnity scheme

- | | | |
|---|---|--|
| <input type="radio"/> NHBC | <input type="radio"/> Zurich Municipal | <input type="radio"/> Consultant Monitored |
| <input type="radio"/> Premier Guarantee/Liberty Legal | <input type="radio"/> Building Lifeplans/Allianz Global Risks | <input type="radio"/> CRL |
| <input type="radio"/> LABC New Homes Warranty | <input type="radio"/> LABC Hallmark Warranty | <input type="radio"/> Buildzone |
| <input type="radio"/> Other | <input type="radio"/> None | <input type="radio"/> Normal |
| <input type="radio"/> Local Authority | <input type="radio"/> New Town Corporation | <input type="radio"/> Housing Assoc. |
| <input type="radio"/> The Coal Authority | <input type="radio"/> Builder/developer | <input type="radio"/> Halifax selling as possessor |
| <input type="radio"/> Investment Club | | |

Who is selling the property?

Name

Do you currently own the property?

☐ Yes ☐ No

Do you currently live at the property?

☐ Yes ☐ No

Will anyone else (aged 17 or over) live at the property?

☐ Yes ☐ No

Occupation within 12 months

☐ All ☐ Part ☐ None

Will business be carried out at this property?

☐ Yes ☐ No

Legal title

What is the tenure of the property?

☐ Freehold ☐ Leasehold ☐ Remaining term of lease (if leasehold)
☐ Common hold ☐ Ownership Interest

How much will the following be? (if applicable)

Annual ground rent

£

Annual service charge

£

Annual chief rent or feu duty (Scotland)

£

Entry date – Scotland only (DD/MM/YYYY)

Type of initial occupancy property

☐ New build ☐ Refurbishment ☐ Conversion

Remortgage details (only to be completed for remortgage applications)

Original purchase price

£

Lender's name

Mortgage account number

Outstanding mortgage amount

£

Please provide details of any improvements

Has your home or nearby building been damaged by subsidence, heave, landslip or does it show any signs of cracking or bulging of walls?

☐ Yes ☐ No

Remortgage details (only to be completed for remortgage applications) (continued)

Accommodation

Please provide the following details about the property

Number of bedrooms

Number of bathrooms

Number of separate toilets

Number of living rooms

Number of habitable rooms

Does the property have:

Central heating

☐ Full

☐ Part

☐ None

Central heating type

☐ Gas

☐ Electricity

☐ Oil

☐ Solid fuel

☐ Other

A conservatory

☐ Yes

☐ No

How many cars can be garaged?

Off road parking

☐ Yes

☐ No

A garden

☐ Yes

☐ No

No of acres

Road charge liability

☐ Yes

☐ No

Is there any other secured lending on the property?

☐ Yes

☐ No

Reason for remortgage

☐ Remortgage only

☐ Remortgage & home improvements

☐ Remortgage & debt consolidation

☐ Remortgage home improvements & debt consolidation

☐ Other

Other secured lending

	Loan 1	Loan 2	Loan 3
Name of lender	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account number	<input type="text"/>	<input type="text"/>	<input type="text"/>
To be repaid or postponed	<input type="radio"/> Repaid <input type="radio"/> Postponed	<input type="radio"/> Repaid <input type="radio"/> Postponed	<input type="radio"/> Repaid <input type="radio"/> Postponed
Customer advised if deed of postponement or ranking agreement needed	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Other occupants

Please give the names of anybody aged seventeen or over and not party to the mortgage who will live at the property.

Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Surname	<input type="text"/>

Valuation details

Valuation type

☐ Valuation

☐ Survey and Valuation

☐ Building Survey and Valuation

☐ Remortgage Property Assessment

☐ Remortgage Valuation

(Applies where product selected offers free valuation incentive)

Access to the property

The keys can be obtained from:

Name	<input type="text"/>		
Telephone number	STD	<input type="text"/>	<input type="text"/>
Evening telephone number	STD	<input type="text"/>	<input type="text"/>
Selling agent (if different)	<input type="text"/>		
Selling agent's telephone number	STD	<input type="text"/>	Extension <input type="text"/>
Other contact details	<input type="text"/>		

Conveyancer's details

Are you using your own conveyancer?

☐ Yes

☐ No

Name of firm	<input type="text"/>		
Address	<input type="text"/>		
Postcode	<input type="text"/>		
Who is acting for you?	<input type="text"/>		
Telephone number	STD	<input type="text"/>	<input type="text"/>
Fax number	STD	<input type="text"/>	<input type="text"/>

Insurance requirements

The property must be insured. We will contact you with details of our general insurance products and provide no obligation quotes, unless insurance has already been arranged.

Would you like a Halifax home insurance quote?

☐ Quote

☐ No Quote

Has insurance already been arranged?

Buildings

☐ Yes

☐ No

Company

Contents

☐ Yes

☐ No

Company

Supporting information

If you want to provide any additional information to support your application, please use the section below.

Section 1

Additional information on previous addresses

Section 2

Additional information on current/previous employers

Supporting information (continued)

Section 3

Additional information on mortgage commitments

Mortgage type	<input type="text"/>
Remaining term	<input type="text"/>
Repayment type	<input type="text"/>
Mortgage lender	<input type="text"/>
Monthly running cost	£ <input type="text"/>
Monthly payment	£ <input type="text"/>
Outstanding balance	£ <input type="text"/>
End date (DD/MM/YYYY)	<input type="text"/>
Current months in arrears	<input type="text"/>
Intend to repay on completion	<input type="radio"/> Yes <input type="radio"/> No
Source of repayment	<input type="text"/>

Section 4

Any other information you feel we might need to know to help us assess your application for a mortgage, in particular, if the loan extends beyond retirement age. Please confirm how you intend to maintain payments.

Easy ways to make your payments.

For your convenience monthly payments will be made from a bank/building society using direct debit. Please complete the section below.

Payment mandate



Instructions to your bank or building society to pay direct debits



To: The Manager

Bank or Building Society

Address

Postcode

Name of account holder(s)

Bank or Building Society account number

Branch sort code

Halifax plc reference number

Originator's Identification Number

883008

Please pay Halifax Direct Debits from the account detailed on this Instruction subject to the safeguards assured by The Direct Debit Guarantee. I understand that this instruction may remain with Halifax and, if so, details will be passed electronically to my Bank/Building Society.

Signature(s)

Date

Signature(s)

Date

Banks and Building Societies may not accept Direct Debit Instructions for some types of accounts.

Do you want to pay your insurance premiums in monthly instalments?

☐

Yes

☐

No

Please retain this section for your information

The Direct Debit Guarantee – this should be retained



- This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme.
- The efficiency and security of the scheme is monitored and protected by your own Bank or Building Society.
- If the amounts to be paid or the payment dates change, the Halifax will notify you 4 working days in advance of your account being debited or as otherwise agreed.
- If an error is made by Halifax, a division of Bank of Scotland plc, or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid.
- You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to us.

This page should be read and retained by all customers.

You will be sent a Customer Confirmation through the post. It sets out the statements you make on which Halifax intend to rely. An example of this is set out below.

Customer Confirmation

If I apply for a mortgage I confirm that I make the following statements:	
I declare that:	<p>I apply for a loan on the security of the property described in my application.</p> <p>I will personally occupy the property; or</p> <p>The mortgaged property will be occupied by a member of my family, or used as my second home.</p> <p>I believe the information given in my application is correct.</p>
I agree that:	<p>You and any subsidiary or associated company of yours, will retain commission paid or allowed on any insurance you arrange.</p> <p>I will notify you of any changes in circumstances relating to my purchase or mortgage before it is entered into and I authorise my conveyancer to disclose such information to you.</p> <p>I have received a Mortgage Illustration relating to the mortgage for which I am applying.</p>
I understand that:	<p>If any up front fee that I am asked to pay to Halifax is described in my illustration as being non-refundable, this means that if the application does not proceed for any reason, I will be unable to recover the fee. Examples of why Halifax might refuse my application include, but are not limited to:</p> <ul style="list-style-type: none">• where it has not been possible to verify my stated income;• where it is discovered that I or any joint applicant have provided false or incomplete information;• where it is discovered that a problem with my property makes it unsuitable as security;• where a property assessment reveals that my property is worth less than I originally indicated;• where Halifax has a reasonable suspicion of fraud and/or other forms of financial crime. <p>I also understand that Halifax may reject my application at any time at its absolute discretion. However, if Halifax chooses to rely on this right, I will be able to recover the up front fees which I have paid to Halifax.</p> <p>If I choose a Homebuyer's Survey and Valuation Report, Halifax will choose the valuer for the property assessment and that it is the valuer's responsibility to agree the Conditions of Engagement for the private survey element with me.</p>
Remortgage customer authority (where applicable)	<p>I authorise Halifax or any conveyancers acting for Halifax in connection with the proposed remortgage of my property:</p> <ul style="list-style-type: none">• to obtain the title deeds to the property;• to obtain a repayment figure from my current lender(s). <p>I confirm that I will make my own enquiries about and pay any fees or charges made by my current lender in connection with the repayment of my existing mortgage (including any administration fees made in respect of sending the title deeds to Halifax's conveyancer and providing a repayment figure and any repayment fee in connection with my existing mortgage).</p> <p>I understand that Halifax's conveyancer is only representing Halifax and that if I want independent legal advice at any stage of this transaction I will arrange it myself.</p> <p>I understand that Halifax may not arrange for an inspection of the property to be carried out. I further understand that Halifax will not routinely tell me what the assessment of the value of the property is. I understand that, if Halifax is prepared to make me a loan, I must not rely upon any assessment made as an indication of the value of the property. Halifax has informed me and I accept that, if I require any information about the value or condition of the property or about any health and safety issues, it is my responsibility to obtain independent advice before I go ahead with the remortgage of the property.</p>
Land Registry	<p>I authorise the conveyancer to obtain copies of any document held at any of the land registries in England and Wales, Scotland, Northern Ireland and Isle of Man.</p>

Privacy Notice

Who looks after your personal information

Your personal 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

Our full privacy notice

This privacy notice contains key information about how we will use and share your personal information and the rights you have in relation to this. If you want to know more please access our full privacy notice at www.halifax.co.uk/privacy or ask us for a copy.

How we use your personal information

We will use your personal information:

- to provide products and services, manage your relationship with us and comply with any laws or regulations we are subject to (for example the laws that prevent financial crime or the regulatory requirements governing the products we offer).
- for other purposes including improving our services, exercising our rights in relation to agreements and contracts and identifying products and services that may be of interest.

To support us with the above we analyse information we know about you and how you use our products and services, including some automated decision making. You can find out more about how we do this, and in what circumstances you can ask us to stop, in our full privacy notice.

Who we share your personal information with

Your personal information will be shared within Lloyds Banking Group and other companies that provide services to you or us, so that we and any other companies in our Group can look after your relationship with us. By sharing this information it enables us to better understand our customer's needs, run accounts and policies, and provide products and services efficiently. This processing may include activities which take place outside of the European Economic Area. If this is the case we will ensure appropriate safeguards are in place to protect your personal information. You can find out more about how we share your personal information with credit reference agencies below and can access more information about how else we share your information in our full privacy notice.

Where we collect your personal information from

We will collect personal information about you from a number of sources including:

- information given to us on application forms, when you talk to us in branch, over the phone or through the device you use and when new services are requested.
- from analysis of how you operate our products and services, including the frequency, nature, location, origin and recipients of any payments.
- from or through other organisations (for example card associations, credit reference agencies, insurance companies, retailers, comparison websites, social media, and fraud prevention agencies).
- in certain circumstances we may also use information about health or criminal convictions but we will only do this where allowed by law or if you give us your consent.

You can find out more about where we collect personal information about you from in our full privacy notice.

Do you have to give us your personal information

We may be required by law, or as a consequence of any contractual relationship we have, to collect certain personal information. Failure to provide this information may prevent or delay us fulfilling these obligations or performing services.

What rights you have over your personal information

The law gives you a number of rights in relation to your personal information including:

- the right to access the personal information we have about you. This includes information from application forms, statements, correspondence and call recordings.
- the right to get us to correct personal information that is wrong or incomplete.
- in certain circumstances, the right to ask us to stop using or delete your personal information.
- from 25 May 2018 you will have the right to receive any personal information we have collected from you in an easily re-usable format when it's processed on certain grounds, such as consent or for contractual reasons. You can also ask us to pass this information on to another organisation.

You can find out more about these rights and how you can exercise them in our full privacy notice.

Other individuals you have financial links with

We may also collect personal information about other individuals who you have a financial link with. This may include people who you have joint accounts or policies with such as your partner/spouse, dependents, beneficiaries or people you have commercial links to, for example other directors or officers of your company.

We will collect this information to assess any applications, provide the services requested and to carry out credit reference and fraud prevention checks. You can find out more about how we process personal information about individuals with whom you have a financial link in our full privacy notice.

How we use credit reference agencies

In order to process your application we may supply your personal information to credit reference agencies (CRAs) including how you use our products and services and they will give us information about you, such as about your financial history. We do this to assess creditworthiness and product suitability, check your identity, manage your account, trace and recover debts and prevent criminal activity.

We may also continue to exchange information about you with CRAs on an ongoing basis, including about your settled accounts and any debts not fully repaid on time, information on funds going into the account, the balance on the account and, if you borrow, details of your repayments or whether you repay in full and on time. CRAs will share your information with other organisations, for example other organisations you ask to provide you with products and services. Your data will also be linked to the data of any joint applicants or other financial associates as explained above.

You can find out more about the identities of the CRAs, and the ways in which they use and share personal information, in our full privacy notice.

How we use fraud prevention agencies

The personal information we have collected from you and anyone you have a financial link with may be shared with fraud prevention agencies who will use it to prevent fraud and money laundering and to verify your identity. If fraud is detected, you could be refused certain services, finance or employment. Further details of how your information will be used by us and these fraud prevention agencies, and your data protection rights, can be found in our full privacy notice.

Our full privacy notice

It is important that you understand how the personal information you give us will be used. Therefore, we strongly advise that you read our full privacy notice, which you can find at www.halifax.co.uk/privacy or you can ask us for a copy.

How you can contact us

If you have any questions or require more information about how we use your personal information please contact us at www.halifax.co.uk/contactus/how-to-complain/complain-online. You can also call us on **0345 720 3040**.

If you feel we have not answered your question Lloyds Banking Group has a Group Data Privacy Officer, who you can contact on **0345 720 3040** and tell us you want to speak to our Data Privacy Officer.

Version control

This notice was last updated in February 2018.

