

# Data capture form

Customer name(s):	
1.	

This form is for the use of financial intermediaries only and is not to be given to the public.

This data capture form is to be used to capture the required information for a Platform mortgage application when you are unable to access our online system, click, or external sourcing systems.

This form is not intended to be submitted to Platform. It will not be actioned and will be returned to you for electronic submission.

PRODUCT REQUIRED	
Product required	Fixed/Discounted/Capped/Tracker Rate (when available)
Term of Fixed/Discounted/Capped/Tracker Rate	Mortgage Club to be used
(tick all applicable)	
(tick all applicable)	
Conforming Non Conforming	
Purchase Remortgage	
Full Status Premier Buy to Let	
Remortgage of the current residential property (Let to Buy)	
Security property currently unencumbered	
security property currently uncircumzered	
ADDITIONAL INFORMATION	
Is this Sale? Advised Non-Advised Face to Face Non Face	ce to Face
Arrangement fee paid to Introducer by applicant(s)	Arrangement fee paid to packager (if appropriate)
Has this fee been included in the loan?	(Excluding valuation fee) Has this fee been included in the loan? Yes No
Valuation fee paid	Estimated legal fees to be paid by applicant(s)
Has this fee been included in the loan?	Has this fee been included in the loan? Yes No
Is any commission you receive being passed back to the applicant(s)? Yes No	
If Yes, please state how much	
Repayment Method	
Repayment Interest Only	
If interest only, state how the loan will be repaid.	
Endowment Pension ISA	
Please state if Other	Provider
Monthly Premium f	
Will the term of this mortgage take the applicant(s) beyond their intended retirement	ent date? Yes No
If so, please state how the payments will be maintained into retirement.	
Personal/Company Pension ISA Inheritance Other	
Projected Retirement Age Applicant 1 Applicant 2	
Are any of the applicants an owner/director/employee of any intermediary involved witl	h this application? Yes No

No

Are any of the applicants professional property developers? Yes

A - PERSONAL DETAILS	1st APPLICANT	2nd APPLICANT
1 Forename(s)		
2 Middle Name(s)		
3 Surname(s)		
4 Title (Mr / Mrs / Miss / Ms / other)		
5 Gender	Male Female	Male Female
6 Previous/other names & title (if applicable)	Tentale	remaie
7 Marital status (married / single / divorced		
living with partner / widowed / separated)		
8 Date of birth		1 1
9 Country of origin		
<ul> <li>10 Resident in the UK</li> <li>11 Do you have the right to work and reside in the UK permanently? (if no to either, please provide details on the additional information sheet)</li> <li>12 National Insurance number</li> </ul>	Yes No No	Yes No Yes No
13 Daytime contact telephone number		
14 Home / Mobile telephone number	Н	н
15 Email address		
16 Number and ages of dependent children		
17 Relationship to joint applicant(s)		
18 Current address		
	Postcode	Postcode
19 Are you currently: (Owner/tenant/living with relative/friend)		A
20 Is this an overseas address?	Yes No	Yes <sup>^</sup> No <sup>^</sup>
21 Date moved to current address	/ /	/ /
22 Previous address		, ,
Please provide full address details for 3 years		
using additional information sheet if necessary.	Postcode	Postcode
23 Were you: (Owner/tenant/living with relative/friend)	A	
24 Is this an overseas address?	Yes No	Yes No
25 Date moved to previous address		
	, ,	. ,
B - INCOME DETAILS - EMPLOYED	1st APPLICANT	2nd APPLICANT
	ompany you should complete the Self Employed Applicant's	s details in Section C overlear
1 Employment Status	Employed Self Employed	Employed Self Employed
2 Name, address and	Non Employed Retired	Non Employed Retired
telephone number Company name of employer		
Address		
If the contact for reference purposes is different, please provide details on the additional information sheet.		
provide details on the additional information sheet.	Postcode	Postcode
Telephone number and fax number	T F	T F
3 Job title		
4 Payroll number		
5 Is your position?	Permanent Fixed Term (please provide details)	Permanent Fixed Term (please provide details)
, a year person	Casual (please provide details)	Casual (please provide details)
6 Date employment started if less than 1 year please provide details of previous employers on the additional information sheet	1 1	1 1
7 Time continuously employed in this line of business		
8 What is your shareholding in the company? (If 25% or more please complete Self Employed	%	%
Section C overleaf)  9 Basic annual income	f p.a.	f p.a.
10 Average annual bonus/commission/overtime	£ p.a.	f p.a.
payments 11 Total annual income	£ p.a.	f p.a.
12 Any other guaranteed income	£ p.a.	f p.a.
13 Source of other income	F	,

To be completed if you have 25% or more shareholding in your company

1	Self-employment type?	Limi Com
2	Name and address of company	
	Please provide details of any other business on the additional information sheet.	
3	Nature of business	
4	Company registration number (if applicable)	
5	VAT number (if applicable)	
6	Date started self employment? (if under 2 years please provide details of previous employment/self employment on the additional information sheet)	
7	What is your shareholding? (If less than 25% please complete the Employed section above)	
8	Are you a professional property developer?	
9	Name, address and telephone number of your accountants.	_
10	What qualifications does your accountant hold? (Chartered / Certified etc)	
11	Your share of the last 3 years net profit figures (or P60 amounts if on PAYE) (Year 1 being	Year
	most recent) Figures for third year required on Mainstream applications over £500,000 only	For Nover
12	Total annual income	£
13	Applicant's income from the Business (where limited inc. salary and dividends, where	Year
	partnership confirm share of net profit)	For N over
14	Any other guaranteed income	£
15	Source of other income	

Limited Company Partnersh	ip Sole Trader
Post	tcode
Post	tcode
/ /	
%	
Post	tcode
Year 1 £	Year 2 f
For Mainstream applications	
over £500,000 only:	
f	
Year 1 £	Year 2 f
For Mainstream applications over £500,000 only:	Year 3 f
f	

Limited Company	Partnershi	ip	:	Sole Trader
	Post	code		
/	/			
	%			
	Post	code		
Year 1 £		Year		
For Mainstream ap over £500,000 only		Year	3	f
£				
Year 1 £		Year	2	£
For Mainstream ap over £500,000 only		Year	3	£
£				

# D - FINANCIAL DETAILS - Current / Latest Residential Mortgage / Tenancy Details

All mortgages / tenancies in the last 12 months. Please state your residential mortgage first.

	-				3 3							
Applicant	Lender / Landlord			If Tenancy is it	ic i+ '   Approximate   Mai		Monthly No. of missed pay				ls this mortgage to	Reason for
1,2,3,4 or joint	Name & Address	Number	/ Tenancy started	private? Y/N	outstanding balance	payment	months 1-3	months 4-6	months 7-12	Conforming Y/N	be retained? Y/N	retention
			/		£	£						
			,		£	£						
			/		£	£						
1 1		I	I	I	1		I	I	I	I	I	ı

	D - FINANCIAL DI	ETAILS Continued					1	st AF	PPLICA	NT					2nd	APPL	CANT
1	If Yes to residential mo	ortgage retained, reason	Ex- N	Marital		Rent	ing				Ex	- Marita	al	Re	nting		
2	What will be your mon mortgage you are reta of this loan?	nthly payment on the ining on completion	£								£						
3	If your residential mort and rented, what will t income be?		£								£						
4	Have you had 3 or mor (cleared or not) on any loan in the last 2 years	/ secured or unsecured	Yes		No				Months			Yes	N	o		ı	Months
5	Have you received hou >50% of the monthly p 12 months?	ising benefit totalling payment due in the last	Yes		No				Months		,	Yes	N	o		N	Months
	If Yes, number of paym	nents	Last 1	1-6 mor	nths		Last 7-12	! mont	hs		La	ıst 1-6 m	nonths		Last 7-1	2 month	ns
6	Have you ever been ba	inkrupt?	Yes		No							Yes	N	0			
	If yes bankruptcy regist	tration / discharge date	Reg	3	/	/	Dis	/				Reg	/	/	Dis	/	/
7	Have you ever entered	into an IVA?	Yes		No							Yes	N	0			
	IVA arrangement / com	npletion date	Arr		/	/	Com	/	/			Arr	/	/	Com	/	/
8	Do you have a convicti- have a prosecution per driving related offence If yes please provide detail information sheet	nding other than for a e or a spent conviction?	Yes		No							Yes	N	О			
9	Have you ever had a pi If yes, please confirm date lenders name		Yes		No			1	1		)	⁄es	No	0		/	1
	ease give monthly amou llowing payment obliga																
	Maintenance/alimony		£								£						
11	IVAs & Outstanding Ba	llance £	£		f	£					£			£			
1	How many Credit / Deb	pit Cards do you hold				E								£			
	& balance outstanding?				1	<u> </u>								L			
13	How much will be repa Have you any other no		£								£						
	commitments?		£								£						
14	Approximate total outs of applicants' other Pla Banking Group Buy to	atform/Co-operative	£								£						
Oth	ner credit commitments	– (including student loans e	exclud	ing bus	iness l	oans)											
	Applicant 1,2,3,4 or joint	Lender		E	Balance O/S	е	Mont	:hly Pa	yment		oan d da	te	comp	oe paid fore letion? '/N	Secured? Y/N	loanı	e secured paid by the nt's business? Y/N
				£			£				/						
				£			£				/						
				£			£				/						
				£			£				/						
				£			£				/						
	E - DETAILS OF F	PROPERTY TO BE M	ORT	GAGE	D												
1	Address of property													Postc	ode		
2	2 Tenure of property			nold		Lea	asehold		If le	ase unex	pire	d, lease	term		yrs		
3	Type of property		Hous	se		De	tached		Sem	i-det		Mi	d Terra	асе	End	Terrace	
			Bung	galow		Stu	udio		Flat			Ma	aisonet	te			
4	Description: Flat/Studio	o/Maisonette	No. o	f floors	in block	<	No. of ur	nits	Which	floor is p	oper	ty locate	ed	Access	via Balcony	/? Yes	No
			Purp	ose bui	lt	Co	nverted										
Ple	ease state number of eac	ch:	Rece	ptions		Bedr	ooms		Kitchens		Bath	rooms		Garag	jes	Outbu	ildings

Front garden

Rear garden

Parking space

Is this open plan?

Please state number of each:

#### E - DETAILS OF PROPERTY TO BE MORTGAGED Continued... Is the property of standard construction? (if no Year of construction if under 10 years is NHBC available? Yes No Yes No please provide details on the additional information sheet) 6. Has the property got any agricultural Yes No If yes, how many? restrictions? Is the property a working Yes No farm/smallholding/croft? Yes No 8 Does the property have more than 3 acres? Is the property: Please circle if applicable 9 Ex Local Auth / MOD/RAF / Housing Ass. / Ex Police 10 If you have previously purchased from the local No If yes, date purchased / authority, was this within the last 5 years? 11 Is the property near/above/adjacent to Yes No commercial premises? (if yes please confirm type, proximity etc.) 12 Does the applicant intend to let the property? Yes No (if yes provide details) 13 Is >25% of the property for non residential usage? Yes No 14 Please give the names of all persons over the First Name Surname Age Relationship to applicant age of 17 who will occupy the property 15 Buy to Let / Let to Buy only: Anticipated rental per month £ 16 Buy to Let only: Is the property to be occupied No Yes by an immediate family member? 17 Buy to Let only: Number of Buy to Let properties owned upon completion of (and including) this application by you and anyone with who you have a financial association. 18 Buy to Let only: Number of Buy to Let mortgages that you and anyone with who you have a financial association will have with Platform/Co-operative Banking Group upon completion of (and including) this application. 19 Approximate total outstanding balance of the other Platform/Co-operative Banking Group mortgages. 20 Including this application, how many mortgages do you currently have with Platform or the Co-operative Banking Group? Yes No 21 Is the property less than 12 months old? 22 Has the property been converted in the last Yes No 12 months? F - DETAILS OF LOAN REQUESTED 1 Amount of loan requested £ 2 Term of loan required years Flexible product only £ 2 Reserve fund credit limit £ 1 Initial loan amount **REMORTGAGE** 1 Estimated value of property £ 2 Would you like an automatic valuation on this case? Yes No Amount originally borrowed £ 3 Date originally Purchased / / Original Purchase Price £ to purchase property £ for £ **Debt Consolidation** 4 Purpose of remortgage Capital Raising Home Improvements Please tick all boxes that apply (If £ for £, tick this box only) If Capital Raising, reason for Capital Raising: Purchasing another property (investment) Purchasing a residential property Purchasing a 2nd home Purchasing a holiday home **Business Purposes** Other If Capital Raising, then is a Transfer of Equity involved? No 5 Any second charges If yes, is this to be paid before completion (please provide details on Section J Additional Information Sheet) Yes No 6 Who should we contact to arrange a valuation? 1 Purchase price (discounted price if under council Right to Buy scheme) £ 2 Estimated Value of Property £ **PURCHASE** 3 Would you like an automatic valuation on this case? 4 Is the property being purchased from a member of your family? Yes No 5 Is this a private sale? Yes No 6 Will the property be subject to a Deed of Gift? No 7 Are you a First Time Buyer? Yes No If yes, what is the sale price? £ 8 Are you selling your existing property? No If no, what are your intentions? Gift 9 Please provide full details of the source of your deposit Inheritance Cashing in investment Policy Savings (please tick all boxes that apply) **Property Sale** Loan(s) Other 10 Name, address & tel. no. of selling agents 11 Name, address & tel. no. of vendor

# We will instruct your solicitor to act on our behalf provided they are on our panel of solicitors. Firm name Solicitor's name Address Postcode Telephone number

## **H - INSURANCE REQUIREMENTS**

Please answer all of the following questions.

**G - SOLICITORS DETAILS** 

Your mortgage application may be delayed if these sections are not completed.

We have made arrangements with Legal & General Insurance Limited to provide insurance services. Please note that contents insurance is not available for Buy to Let products.

#### **Buildings / Buildings & Contents**

Adequate Buildings Insurance for the mortgaged property is a condition of the loan. You should also insure the contents. Flats – under the terms of the lease the buildings insurance is usually the responsibility of the freeholder. We can help with your insurance requirements through our arrangement with Legal & General Insurance.

## Please tick the box if you DO require Legal & General to contact you with regards to a Home Insurance quotation.

If you arrange Buildings Insurance cover through an alternative insurer, an administration fee will be payable.

Please note that full cover details will need to be supplied to us and failure to do this may result in a delay in processing your mortgage.

#### **Mortgage Payment Protection Insurance**

Platform strongly recommends that you take out accident, sickness and involuntary unemployment insurance known as mortgage payment protection insurance, in connection with your mortgage application. Following the Government's changes to income support, it is clear that protecting you and your family has never been more important.

We can help you with your insurance requirements through our arrangement with Legal & General Insurance.

Please tick the box if you DO require Legal & General to contact you with regards to a Mortgage Payment protection Insurance quotation.

Platform and your Introducer may receive commission from Legal & General in respect of your insurance requirements. Legal & General Insurance Limited, Registered in England No. 423930, One Coleman Street, London, EC2R 5AA, is authorised and regulated by the Financial Conduct Authority for insurance business. Legal & General is not part of the Group (as defined in the Data Protection Notice). Platform do not charge any fees for introduction to Legal & General Insurance Company.

# I - BUY TO LET PORTFOLIO

ADDRESS (including Postcode)	Date of purchase	Monthly rental £	Price Paid	Estimated value £	Amount of loan outstanding £	Name & full address of the lender	lender	Start date of current mortgage	Monthly payment to lender
1.									
Owner(s) Full names									
2.									
Owner(s) Full names									
3.									
Owner(s) Full names									

# **DETAILS OF OTHER PROPERTIES OWNED**

ADDRESS (including Postcode)	Date of purchase	Price Paid	Estimated value	Amount of loan outstanding £	Name & full address of the lender	lender	Start date of current mortgage	Monthly payment to lender
1.								
Owner(s) Full names								
2.								
2.								
Owner(s) Full names								
3.								
Owner(s) Full names								

J - PAYMENT DETAILS							
Your Bank/Building Society Acco	ount details for Direct Debit payments						
Name(s) of account holder(s):							
Bank Sort Code:	Bank/Building Society account number:						
Bank/Building Society name:	Bank/Building Society address:						
Your card details for fee paymen	nts						
Type of card:	Credit card number:						
Security code:	(the last 3 digits on the back of the credit card or 4 digits above the credit card number on Amex)						
Expiry date:	Name on the card:						
Billing address of the card holde	r:						
	Postcode:						
K - ADDITIONAL INFO	ADMATION CHEET						
K - ADDITIONAL INFO	RMATION SHEET						
Please use this section to provide	the additional information requested in any of the questions and any other information which will help in assessing your						
mortgage application. PLEASE IN	DICATE SECTION LETTER AND QUESTION NUMBER WHERE APPLICABLE.						
1							

The Co-operative Bank p.l.c. is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (No. 121885). The Co-operative Bank, Platform, smile and Britannia are trading names of The Co-operative Bank p.l.c., P.O. Box 101, 1 Balloon Street, Manchester M60 4EP. Registered in England and Wales No. 990937. Credit facilities are provided by The Co-operative Bank p.l.c. and are subject to status and our lending policy. The Bank reserves the right to decline any application for an account or credit facility. The Co-operative Bank p.l.c. is a member of the Council of Mortgage Lenders and subscribes to the Lending Code which is monitored by the Lending Standards Board.