

Intermediary Self Build Mortgage Enquiry

Intermediary details

Name _____ Date _____

Firm name _____

Email _____ Contact number _____

Applicant 1

Name _____

Age _____ Expected retirement age _____

Occupation _____

Length of service _____

Previous job if under 6 months _____

Applicant 2

Name _____

Age _____ Expected retirement age _____

Occupation _____

Length of service _____

Previous job if under 6 months _____

Employment status

employed self employed

Income employed

Basic income £ _____

Overtime/bonus/commission £ _____

Other income (specify) £ _____

Income self employed

(Ltd.co - net profit plus salary/salary + dividends)

Most recent £ _____

Previous year £ _____

Employment status

employed self employed

Income employed

Basic income £ _____

Overtime/bonus/commission £ _____

Other income (specify) £ _____

Income self employed

(Ltd.co - net profit plus salary/salary + dividends)

Most recent £ _____

Previous year £ _____

Commitments

Type (credit card, loan etc)	Balance	Monthly payment	To be repaid?
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____

Commitments

Type (credit card, loan etc)	Balance	Monthly payment	To be repaid?
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____
_____	£ _____	£ _____	£ _____

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Household

Number of adults in household

Number of children in household

Monthly expenditure during the build

Nursery/School/University Fees	£	_____
Council tax	£	_____
Insurances	£	_____
Food & drink	£	_____
Travel & transport	£	_____
Recreation	£	_____
Household bills (including mobiles/broadband/TV etc)	£	_____

Monthly expenditure once the build is complete (estimates)

Nursery/School/University Fees	£	_____
Council tax	£	_____
Insurances	£	_____
Food & drink	£	_____
Travel & transport	£	_____
Recreation	£	_____
Household bills (including mobiles/broadband/TV etc)	£	_____

Enquiry details

<input type="checkbox"/> Purchase (doesn't own the plot)	<input type="checkbox"/> Remortgage (already owns the plot) - current balance outstanding	£	_____		
Land value	£	_____	Plot size (we cannot lend on plots larger than 20 acres)	_____	
Loan amount	£	_____	Applicants level of own savings	£	_____
Estimated final value	£	_____	Total build costs	£	_____
LTV based on final value	_____	Location of plot	_____		
Initial release amount	£	_____	Current value/purchase price	£	_____
After the build is complete will repayments be	<input type="checkbox"/> capital & interest	<input type="checkbox"/> part & part	<input type="checkbox"/> interest-only		
Term (in years)	_____				

Construction type – please give as much detail as possible

Where will the applicants live during the build?

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Will there be mortgage or rent payments during the build?

yes - per month £ _____ no

Do applicants have sufficient savings (minus funds being allocated for the self build project) to cover two years' worth of mortgage or rent payments?

yes no

(If not the amount will be treated as a monthly commitment when calculating affordability during the build)

If the property is partially built please give the current build stage

Does either applicant have any adverse credit history? Please give details

Is the planning permission

outline full Class Q

Will more than one property be built on the development site (e.g. plot 1 of 4)?

yes - add details below no

If the property has shared access, please advise of the relationship between the applicant and the owner of the property access will be shared with

Please provide any further relevant details of the self build project

Security will be required for any loan.

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