



Revised Property Details

(Existing mortgage application)

Please complete this form in BLOCK CAPITALS and use black ink.
This form should only be used in connection with an existing mortgage application and if your personal circumstances have **not** changed since the original application.

FOR OFFICE USE ONLY

A/ _____

Date allocated _____ Allocated by _____

CUE number _____

Client number(s) _____ 12/ _____ 12/ _____

Names

Title	Forename(s)	Surname	Date of birth			Gender
			DAY	MONTH	YEAR	

The property

Full postal address of the property

Town	
County	Postcode

Do you currently own the property? Yes No

Do you currently occupy the property? Yes No

Will you personally use the property only for residential purposes immediately after you enter into the mortgage? Yes No

If 'No' then you will have to fill in an additional questionnaire

Is the property to be occupied for the first time in its current state? Yes No

Type of initial occupancy?

New Build		Refurbishment		Conversion	
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Is the property new or to be built? Yes No

If 'Yes' give the name and address of the builder

Postcode	

If a new property is being purchased, please confirm the Building Standards Indemnity Scheme

NHBC Zurich Newbuild Building Life Plans

Consultant Monitored Premier Guarantee None

Other

Who is selling the property?

Normal Local Authority New Town Corporation

Housing Assoc. The Coal Authority

Investment Club Name _____

Entry date (Scotland only) _____

The loan

Purchase price (excluding carpets and curtains) £ _____

Total value of cash incentives £ _____

How much do you want to borrow in total? £ _____

Amount to be used for home purchase £ _____

How long do you want the loan for? _____ yrs

Cost of improvements/alterations you intend to make (please enclose estimates/plans) £ _____

How much do you want to borrow for home improvements/to raise capital? £ _____

If you are getting a grant from the local authority, please state how much £ _____

Amount of deposit £ _____

If the property is to be bought under a shared ownership or equity share scheme, please give type and percentage share to be bought

_____ %

Type of purchase _____

Type of property

House		Bungalow		Converted Flat		Purpose-built flat		Other	
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Detachment type Semi Detached Detached Mid Terrace End Terrace

If 'Other' please give details _____

Age of property _____ yrs

If property is a flat: Does the block include any business premises? Yes No

Number of floors in the block (approximately) _____

What is the current type of legal title (for example, freehold, leasehold, etc)? _____

If leasehold – what is the remaining term of lease (if known)? _____ yrs

What is the service charge, if any? £ _____ p

Annual ground rent (if known) £ _____ p

Can the ground rent be increased? (if known) Yes No

Annual chief rent or feu duty (Scotland only) £ _____ p

Number of bedrooms _____

Does the property have a garage (either on or off-site)? Yes No

Apart from the loan, where will the rest of the money you need to buy the property come from?

Savings		Family		Builders		Tenant's incentive scheme		Other	
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If other (for example, proceeds from an endowment policy, money (personal), please specify

What way of repaying the mortgage would you like? (for example, Interest-only, part interest-only or repayment. If part interest-only, please state the amount of loan you wish to be covered)

Set out the mortgage product(s) and interest rate(s) you are applying for and the amount(s) of loan to be allocated to each mortgage product, if you are applying for different mortgage products for different parts of the total loan

Has KFI been received by all parties Yes No

Valuation and inspection

We will need a valuation of the property. The nature and limitations of a Scheme 1 Mortgage Valuation Report and a comparison with two more detailed types of inspections which can be arranged for your own use, are described in our Valuations and Surveys leaflet.

WE RECOMMEND THAT YOU ARRANGE FOR A MORE DETAILED INSPECTION OF THE PROPERTY FOR YOUR OWN PROTECTION.

Please read the appropriate guide and indicate which type of inspection you require:

Scheme 1– Mortgage Valuation Report

Scheme 2– Home Buyer’s Survey

Scheme 3– Building Survey

Please give details of the vendor and where the key can be obtained if different. (Please give name and both home and work telephone numbers.)

Please give the name, address and telephone number of the estate agents (if any) who are handling the sale of the property

The Insurance

Insurance cover as previously arranged

Amend insurance cover as agreed

Do not wish to arrange through us

Please contact me to arrange insurance

Additional details

PLEASE GIVE SPECIFIC DETAILS OF ANY OTHER CHANGES TO THE INFORMATION INSERTED IN THE ORIGINAL APPLICATION FORM(S); FOR EXAMPLE, LIFE ASSURANCE, OTHER OCCUPANTS, PROPERTY INSURANCE ETC.

AGENT’S/INTERMEDIARY’S USE ONLY

TYPE OF FEE

ADDED TO LOAN -YES/NO

IF NO - DATE PAID

Originating Agent’s/Intermediary’s details

COMPANY NAME

INDIVIDUAL AGENT’S/INTERMEDIARY’S FULL NAME

TELEPHONE NUMBER (INCL. STD CODE)

FAX NUMBER (INCL. STD CODE)

ADDRESS TO WHICH CORRESPONDENCE SHOULD BE SENT (POSTCODE MUST BE ENTERED)

POSTCODE

AGENT’S/INTERMEDIARY’S RECOMMENDATION

If any special conditions have been agreed with us, details of the agreement, the manager’s name and the date MUST be given along with any additional information which may be relevant to this application.

I recommend this application to proceed, which carries my full support.

SIGNATURE

DATE

FOR OFFICE USE ONLY

Introducer Panel No.

(Enter Mortgage Desk Panel No. if appropriate)

1/ -

OUR RECOMMENDATION

I confirm that I am satisfied with this application and recommend that it proceeds in line with all procedures set out in the Lending Manual.

PRINT FULL NAME

PERSONNEL NUMBER

SIGNATURE

DATE

FEE PAYMENT

If you would like to pay your fee(s) by either credit or debit card, please complete the following details.

You can pay by one of the following methods



Please debit my account with the amount of:

£ [input field]

My card number is

[16 digit card number input field]

My card expiry date is

[MM/YY expiry date input field]

My issue number is (Switch and Solo only)

[issue number input field]

My card is valid from (Switch and Solo only)

[valid from date input field]

Signature of cardholder

[signature input field]

Date

[date input field]

HALIFAX ACCOUNT (REQUEST TO TRANSFER FUNDS)

If you would like to pay your fee(s) by debiting your Halifax account, please complete the following details.

Account Roll number [input field] / [input field] - [input field]

Type of fee(s) [input field]

Amount £ [input field]

(In the case of accounts where more than one signature is required, all the appropriate account holders must sign.)

Signed [input field] [input field]

Date [input field] [input field]

Customer Confirmation THIS SECTION SHOULD BE READ AND RETAINED BY ALL CUSTOMERS

DATA PROTECTION NOTICE - To see how we use your information, please read the privacy statement on our website www.halifax.co.uk/privacy or ask for a printed copy of this.

We will use your information to contact you by mail, telephone, e-mail, SMS or otherwise about other products and services that may be of interest to you. If you do not wish to receive this information please advise your local branch or visit www.halifax.co.uk/privacy for details on how to opt out of this service.

We will search credit reference and fraud prevention agencies to check your identity, credit status and to help us make decisions. For this application, we will assess you on your own (except for another party to this application). If you submit an application, you declare that your financial associate's finances will not affect our decision. We check your declaration and may decline the application if it is inaccurate.

If false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention 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 statement at www.halifax.co.uk/privacy or contacting your local branch.

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

