



**This form can be completed electronically, saved and printed.
If completing manually, please complete in black ink and BLOCK CAPITALS. Complete all boxes that apply.**

Advisor Name	<input type="text"/>	Company Name	<input type="text"/>
Company FCA Registration No	<input type="text"/>	Email Address	<input type="text"/>
Office Address	<input type="text"/>	Telephone No	<input type="text"/>
FCA Status (please tick as appropriate)	<input type="checkbox"/> Directly Authorised	<input type="checkbox"/> Appointed Representative	Mortgage Club Name (if applicable)
Network Name (if applicable)	<input type="text"/>	Network FCA Registration Number (if applicable)	<input type="text"/>
Packager (if applicable)	<input type="text"/>	Packager FCA Registration Number (if applicable)	<input type="text"/>
Which level of service have you provided in accordance with the Mortgage Conduct of Business rules?	<input type="checkbox"/> Advised	<input type="checkbox"/> Execution-only	
If we are paying a procurement fee will any part of this be refunded to the applicant(s)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
If YES, how much will be refunded?	<input type="text"/>		
Is the applicant(s) paying a fee to you for arranging the mortgage?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
If YES, how much will they pay?	<input type="text"/>		
When is the fee payable?	<input type="checkbox"/> On application	<input type="checkbox"/> On offer acceptance	<input type="checkbox"/> On completion

MORTGAGE PRODUCT RECOMMENDED

Which product number have you recommended

PAYMENT OF PROCURATION FEES

Please confirm how the Procurement Fee is split

Broker Company: <input type="checkbox"/>	Network: <input type="checkbox"/>	Mortgage Club: <input type="checkbox"/>	Packager: <input type="checkbox"/>
Percentage of fee: <input type="text"/>	Percentage of fee: <input type="text"/>	Percentage of fee: <input type="text"/>	Percentage of fee: <input type="text"/>

DECLARATION

- I have verified the customer(s) identity and will retain suitable records of the evidence seen to satisfy identity verification requirements under the Money Laundering Regulations 2007 and the Financial Services and Markets Act 2000. I will make these records available, on request, to Chorley & District Building Society or the Financial Conduct Authority.
- I can confirm that I have seen the original of all documents sent to support this mortgage application and that the documents submitted are a true copy of the original
- I have advised the customer on the types of valuations and surveys available, the other costs payable and credit searches.
- The registration number for the Financial Conduct Authority (FCA) completed above is correct;
- I have complied with the FCA rules in giving advice to the customer(s);
- I have provided the applicant(s) with an accurate ESIS prior to application;
- I am duly authorised to submit this application and am not doing so on behalf of an unauthorised person or firm.

I have taken into consideration and assessed the impact of COVID-19 on the applicant's employment and income, and have attached the supplementary Coronavirus Declaration. Yes No

This can be found under supporting documents on the 'How to Apply' section of the website.

Intermediary signature: Date:

FEES PAYABLE TO THE SOCIETY

Further Borrowing Application Fee – please refer to our tariff of fees and charges Product Scheme Fee – Variable
 * Please ask your clients to call the Society on 01257 235001 to pay their application fee. We require this in advance of processing their application.

1. Applicant Details

	1st Applicant	2nd Applicant
Existing Account Numbers	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
First Name	<input type="text"/>	<input type="text"/>
Middle Name	<input type="text"/>	<input type="text"/>
Any previous name(s)	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>
NI Number	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
Home telephone number	<input type="text"/>	<input type="text"/>
Work telephone number	<input type="text"/>	<input type="text"/>
Mobile telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>
Details of dependants. Names & Ages	<input type="text"/>	<input type="text"/>
Do you currently, or have you ever held a senior position of public trust in the UK or elsewhere (i.e. as a politician, councillor, or judge whether full or part time, paid or unpaid) or are/were you closely connected to anyone that does or did hold one of these positions? Please enter full details in the additional comments section.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Additional borrowing amount required	<input type="text"/>	
How much of the loan is required for:		
Home Improvements (Please provide details in additional comments section)	<input type="text"/>	Debt Consolidation (Please provide details in additional comments section) <input type="text"/>
Capital Raising (Please provide details in additional comments section)	<input type="text"/>	Other (Please provide details in additional comments section) <input type="text"/>

2. Employed Applicant Details

	1st Applicant	2nd Applicant
What is your occupation?	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Current employer business/sector type	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
What is your employment status?	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
If other, please state here	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Expected retirement age	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
What is your annual gross basic income	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Guaranteed Gross Other <small>(Detail in additional comments section)</small>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Regular Gross Other <small>(Detail in additional comments section)</small>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Current employer name	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Current employer address	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
	Postcode <input style="width: 100px;" type="text"/>	Postcode <input style="width: 100px;" type="text"/>
Current employer telephone number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Current employer fax number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Time with your current employer	From Month <input style="width: 30px;" type="text"/> Year <input style="width: 30px;" type="text"/>	From Month <input style="width: 30px;" type="text"/> Year <input style="width: 30px;" type="text"/>
How long have you been in your current role	Years <input style="width: 30px;" type="text"/> Months <input style="width: 30px;" type="text"/>	Years <input style="width: 30px;" type="text"/> Months <input style="width: 30px;" type="text"/>
Previous employer name	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Previous employer address	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
	Postcode <input style="width: 100px;" type="text"/>	Postcode <input style="width: 100px;" type="text"/>
Previous employer telephone number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Previous employer email address	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Point of Contact <small>– if an employer’s reference is required</small>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Time with your previous employer	From <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> To <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>	From <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/> To <input style="width: 30px;" type="text"/> <input style="width: 30px;" type="text"/>
Are you aware of any impending changes to your employment conditions: <small>If yes, provide details in the additional comments section.</small>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you in a probationary period: <small>If yes, provide details in the additional comments section.</small>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is your current employment permanent: <small>If no, provide details in the additional comments section.</small>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is this a family business? <small>If yes, provide company accountant details in section 3.</small>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you hold shares in this or any other company: <small>If yes, provide details in the additional comments section with % shareholding.</small>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

3. Self-Employed Applicant Details

	1st Applicant	2nd Applicant
Title in company	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Company Trading Name	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Company Trading Address	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
	Postcode <input style="width: 100px;" type="text"/>	Postcode <input style="width: 100px;" type="text"/>
Company telephone number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Company email address	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
What is your % shareholding/shares in the business	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
How long has the business been trading?	Years <input style="width: 40px;" type="text"/> Months <input style="width: 40px;" type="text"/>	Years <input style="width: 40px;" type="text"/> Months <input style="width: 40px;" type="text"/>
Expected retirement age	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Type of company	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Net Profit (If sole trader / partnership) Please provide information for last 3 years	Year End <input style="width: 80px;" type="text"/> £ <input style="width: 80px;" type="text"/> Year End <input style="width: 80px;" type="text"/> £ <input style="width: 80px;" type="text"/> Year End <input style="width: 80px;" type="text"/> £ <input style="width: 80px;" type="text"/>	Year End <input style="width: 80px;" type="text"/> £ <input style="width: 80px;" type="text"/> Year End <input style="width: 80px;" type="text"/> £ <input style="width: 80px;" type="text"/> Year End <input style="width: 80px;" type="text"/> £ <input style="width: 80px;" type="text"/>
Salary / Dividend if Limited Company Please provide information for last 3 years	Salary £ <input style="width: 150px;" type="text"/> Dividend £ <input style="width: 150px;" type="text"/> Year End <input style="width: 150px;" type="text"/> Salary £ <input style="width: 150px;" type="text"/> Dividend £ <input style="width: 150px;" type="text"/> Year End <input style="width: 150px;" type="text"/> Salary £ <input style="width: 150px;" type="text"/> Dividend £ <input style="width: 150px;" type="text"/> Year End <input style="width: 150px;" type="text"/>	Salary £ <input style="width: 150px;" type="text"/> Dividend £ <input style="width: 150px;" type="text"/> Year End <input style="width: 150px;" type="text"/> Salary £ <input style="width: 150px;" type="text"/> Dividend £ <input style="width: 150px;" type="text"/> Year End <input style="width: 150px;" type="text"/> Salary £ <input style="width: 150px;" type="text"/> Dividend £ <input style="width: 150px;" type="text"/> Year End <input style="width: 150px;" type="text"/>
Name of your accountant	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Accountants address	<input style="width: 100%; height: 40px;" type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
	Postcode <input style="width: 100px;" type="text"/>	Postcode <input style="width: 100px;" type="text"/>
Accountants telephone number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Accountants fax number	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Accountants qualification	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Monthly Income	
Net monthly take home pay (applicant 1)	£
Net monthly take home pay (applicant 2)	£
Any other income	£
Please state source of other income	
Total Monthly Income:	£
Monthly Expenditure	
Mortgage on another property	£
Secured Loans	£
Personal Loans	£
Credit Card Minimum Payments	£
Store Card Minimum Payments	£
Hire Purchase / Lease Agreements	£
Home Shopping Credit Minimum Payments	£
Help to Buy Loan (if applicable)	£
Overdraft Usage Charges / Interest	£
Nursery / Child Minding / School Fees	£
Maintenance / Alimony	£
Cost of Funding Repayment Strategy	£
Mobile Phone Contract	£
Broadband / Home Telephone	£
Council Tax	£
Gas & Electricity	£
Water	£
Other Utilities (ie Calor Gas, Oil)	£
Insurance (Life/Critical Illness)	£
Mortgage Protection / ASU / Inc Protection	£
Home Insurance	£
Ground Rent / Service Charges	£
Car Insurance / MOT / Car Tax / Maintenance	£
Travel Costs inc Fuel, Bus, Rail Fares	£
Other Insurance (Pet/Dental/Health)	£
Total Expenditure:	£
Net Disposable Income:	£

4. Credit History

Mortgages and other secured loans – (where more space is required please provide further details within the additional comments section)
* If you have Buy to Let properties (not with the society) please complete section 4a.

Lender	Address against which the loan is secured	Account Number	Outstanding Term	Outstanding Balance	Monthly Payment	To be repaid?
						<input type="checkbox"/> Yes <input type="checkbox"/> No
						<input type="checkbox"/> Yes <input type="checkbox"/> No
						<input type="checkbox"/> Yes <input type="checkbox"/> No
						<input type="checkbox"/> Yes <input type="checkbox"/> No

4a. Mortgaged Buy to Let Properties – please provide details below

Where more space is required please provide further details within the additional comments section.

Rental Address	Lender	Current Value	Outstanding Term	Outstanding Balance	Monthly Payment	Monthly Rent Received	Mortgage Repayment Type

4b. Unsecured loans / credit cards / HP – please provide details below

Lender	Address against which the loan is registered	Outstanding Term	Outstanding Balance	Monthly Payment	To be repaid?
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

Declarations

	1st Applicant		2nd Applicant	
Have you ever had a mortgage or loan application refused?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever had a County Court Judgement for debt or a loan default registered?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever been declared bankrupt or been subject to an Individual Voluntary Arrangement (IVA)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever entered any arrangements with your creditors or are you party to a voluntary arrangement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you had a court order / decree made against you for debt or is there any such action pending?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever (voluntarily or otherwise) had a property repossessed by a lender or entered any arrangements for mortgage arrears?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you, any member of your family, or any person living with you, ever been cautioned, convicted or charged (but not yet tried) in respect of any criminal offence (excluding motoring convictions)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**If the answer is YES to any of the above, please enter full details below.
If further space is needed, please provide details in the additional comments section.**

1st/2nd/Joint	Type (i.e. Mortgage, IVA, CCJ)	Relating To	Reason	Date Registered	Amount	Date satisfied / still outstanding

5. To be completed for all types of mortgages

Will there be any people aged over 17, who will live in the property?
(If yes, please supply their names, dates of birth and relationship to you, in the additional comments section)

Yes No

Will any of the property be used for purposes other than your own residence?

Yes No

If yes, will your residential use exceed 40% of the overall area of the property?
Please supply further details in the additional comments section, detailing the purpose for which the property will be used.

Yes No N/A

Are you aware of any planning restriction(s)?

Yes No

Will any additional borrowing be secured against the property by a second charge?

Yes No

Will the mortgage be for the direct financial benefit and advantage of all applicants?
If no, please supply further details in the additional comments section.

Yes No

6. Additional Information

7. Life Planning

In view of the financial commitment your mortgage represents, we recommend you undertake a review of your insurance provisions.

As part of your mortgage contract you must have adequate Buildings Insurance in place throughout the term of your mortgage for no less than the recommended insurance cover figure, quoted on your valuation report.

It is also important you review your contents, life assurance, critical illness cover and health insurance.

We work closely with Accord Legal Services, who provide a Will writing and estate planning service, ensuring your assets and loved ones are protected in the best way.

If you would like to be contacted by Accord Legal Services please tick here

Alternatively, you can get more information via our website www.chorleybs.co.uk/life-planning

If you need further information about insurance and life planning, we suggest you visit www.themoneyadvice.org.uk.

8. Summary of Additional Borrowing Requirements

Term (years)	<input type="text"/>
Amount	<input type="text"/>
Fees to be added (if allowed)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Fee amount to be added (if applicable)	<input type="text"/>
Mortgage Repayment Type	<input type="text"/>
Where part repayment / part interest only, state the amount required on interest only	<input type="text"/>
If interest only, repayment strategy	<input type="text"/>

If you have requested an interest only mortgage, it is your responsibility to ensure you have sufficient funds to repay the mortgage at the end of the term.

9. Keeping you up to date about our Products and Services

From time to time the Society will send you information about other products and services we offer by post. We will only do this where we believe we have a legitimate interest to do so and it is not to the detriment of your interests, fundamental rights and freedoms. More information can be found in our privacy notice.

We also want to provide you with this information by Email and Telephone. If you do not wish to receive such material by these methods then please tick the appropriate boxes.

1st Applicant

Email Telephone

2nd Applicant

Email Telephone

10. Additional Comments



Certification of supporting documentation for a mortgage application

**This form can be completed electronically, saved and printed.
If completing manually, please complete in black ink and BLOCK CAPITALS. Complete all boxes that apply.**

Mortgage Application Reference	
1st Applicants Name	
2nd Applicants Name	
3rd Applicants Name	
4th Applicants Name	

Please tick below the supporting documents you are enclosing with your case. There is space in the other documents section for you to list any items you are enclosing which are not specifically listed below.

Not all of the following documents are required for every case.

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
PROOF OF EMPLOYED INCOME				
Last 3 months payslips				
P60 from most recent tax year end				

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
PROOF OF SELF-EMPLOYED INCOME				
Last 2 years SA302's				
Last 2 years corresponding tax overview				
Latest 3 months Business Bank Statements				

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
BANK STATEMENTS				
Latest full month's personal bank statement				

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
OTHER DOCUMENTS				

This document should be posted with your mortgage application to:

Chorley Building Society
Key house
Foxhole Road
Chorley
PR7 1NZ

Or emailed to:

intermediaries@chorleybs.co.uk