

# BTL Enquiry Form

## APPLICATION DETAILS

### Broker

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Borrowing Entity:  Personal  Ltd  Trust  LLP  Partnership

Where lending is to a Ltd Co/LLP please provide name of company:

Purpose of Mortgage:  Purchase  Remortgage  Transfer of Equity

### Loan Details

Loan amount / LTV required: \_\_\_\_\_ Purpose of loan: \_\_\_\_\_

### Product Requirements

Loan Term Required: \_\_\_\_\_

Repayment Type:  Interest Only  Repayment Rate Type Required:  Fixed Rate  Tracker/Variable

## APPLICANT DETAILS

### Applicant 1

Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address  
(3 years address history): \_\_\_\_\_

Personal Income (£): \_\_\_\_\_ Occupation: \_\_\_\_\_

Contact Tel. Number: \_\_\_\_\_

How many BTL properties owned? \_\_\_\_\_

How many commercial properties owned? \_\_\_\_\_

How many years letting experience? \_\_\_\_\_

Does applicant own a residential property?  Yes  NoResidential status  Homeowner  Tenant  Living with Family

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## APPLICANT DETAILS (continued)

### Applicant 2

Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address  
(3 years address history): \_\_\_\_\_

Personal Income (£): \_\_\_\_\_ Occupation: \_\_\_\_\_

Contact Tel. Number: \_\_\_\_\_

How many BTL properties owned? \_\_\_\_\_

How many commercial properties owned? \_\_\_\_\_

How many years letting experience? \_\_\_\_\_

Does applicant own a residential property?  Yes  No

Residential status  Homeowner  Tenant  Living with Family

## EX-PAT

### Applicant 1

Country of Residency: \_\_\_\_\_ Nationality: \_\_\_\_\_

Occupation: \_\_\_\_\_ Income (UK taxed and UK equivalent): \_\_\_\_\_

Number of UK Properties Owned: \_\_\_\_\_ Number of properties with mortgages for more than 12 months: \_\_\_\_\_

### Applicant 2

Country of Residency: \_\_\_\_\_ Nationality: \_\_\_\_\_

Occupation: \_\_\_\_\_ Income (UK taxed and UK equivalent): \_\_\_\_\_

Number of UK Properties Owned: \_\_\_\_\_ Number of properties with mortgages for more than 12 months: \_\_\_\_\_

## SECURITY DETAILS

Security Address: \_\_\_\_\_

Property Value/Purchase Price: \_\_\_\_\_

Current Mortgage Balance (Remortgage): \_\_\_\_\_

Current Lender (Remortgage): \_\_\_\_\_ Current monthly mortgage payment: \_\_\_\_\_

Client ever resided in property?  Yes  No BTL Type (Flat/House/Studio): \_\_\_\_\_

Leasehold  Freehold Above commercial unit?  Yes  No

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## SECURITY DETAILS (continued)

High rise? (how many stories, is there a lift, what floor is security on?): \_\_\_\_\_

Ex Local?  Yes  No EPC Rating: \_\_\_\_\_

Multi unit? (how many units in block and size): \_\_\_\_\_ Date Purchased: \_\_\_\_\_

Rental Income: \_\_\_\_\_ Currently let?  Yes  No

Tenant type (working professionals, DSS tenants, etc): \_\_\_\_\_

Single AST, Multiple AST's? \_\_\_\_\_

## ADDITIONAL INFORMATION

Deposit source (Purchases): \_\_\_\_\_

Credit history – any CCJs/ Defaults/missed payments – if yes provide details:

\_\_\_\_\_

Additional information – please provide any further details relating to the enquiry:

\_\_\_\_\_

I confirm that the information contained within this application is true and correct to the best of my knowledge.  
I have the client's authority to share this information.

I have advised the applicant(s) that a formal credit search may be carried out in their name(s) with credit reference agencies who will record details of the search and may create a financial association with those with whom they are linked financially. The applicant(s) has/have given authority to my company to instruct Charleston Financial to carry out a formal credit search and/or to instruct others to do so in connection with obtaining finance on their behalf.

If you do not have the applicants authority to carry out a credit search, please do not sign below. However you can still send the completed form back to us and we will provide indicative terms, which will be based on the assumption customer has clear credit, unless otherwise stated.

### Signed by broker or applicant

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_