June 2026 v1.0

THE MORTGAGE LENDER
real life lending
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DATA CAPTURE RESIDENTIAL.

This is a data capture form only – all applications must be made using our Online Mortgage Application Service

NB The order of questions on this form follows the data capture order in our online portal.

INTERMEDIARY DETAILS

Intermediary Name	
Company Name	
FCA Status	Directly Authorised ☐ Appointed Representative ☐
FCA Number	
Registered Address	
Principal FCA Number/Name	/
Is sale advised?	Yes ☐ No ☐
How was the sale made?	Face to face ☐ Non face to face ☐
Name of Network	
Name of Mortgage Club	

PRE-REQUISITE QUESTIONS

Does the application meet the following minimum standards?	Tick boxes below	Notes
Has the applicant(s) previously been convicted of fraud, terrorism, organised crime, money laundering, arson or possession or supply of drugs?	Yes ☐ No ☐	
Is the property in Northern Ireland?	Yes ☐ No ☐	
Does the property require a stage build mortgage?	Yes ☐ No ☐	
Does the property meet the security criteria?	Yes ☐ No ☐	
Excluding Expat applications, do all applicants have a valid UK work visa or a statutory right to work in the UK?	Yes ☐ No ☐	
Do any of the applicants have Diplomatic Immunity?	Yes ☐ No ☐	
Have any of the applicants been party to a mortgaged property that has been repossessed in the last 6 years?	Yes ☐ No ☐	

LOAN DETAILS

Loan Purpose	
First-Time Buyer	Yes ☐ No ☐
Shared Ownership	Yes ☐ No ☐
Housing Association (Shared Ownership only)	
Percentage being purchased (Shared Ownership only)	
Value of share (Shared Ownership only)	£
Rental/Service charges (Shared Ownership only)	£
Estimated Value/Purchase Price	£
Loan Amount	£
Term	Years Months
Repayment Type	Capital Repayment ☐ Interest Only ☐ Part & Part ☐
Interest Only Amount (if Part & Part)	
Will this be applicant's main residence	App 1 Yes ☐ No ☐
	App 2 Yes ☐ No ☐
Product and Rate	

Repayment Strategy Summary		
Repayment Strategy	Equity in the property	Current Value
Sale of Security Property	£	Not applicable
Sale of Other Property	£	Not applicable
Investments	Not applicable	£
Savings	Not applicable	£

If purchase, please provide the source and amount of deposit

Savings	Sale of Existing Property	Sale of Shares/ Investments	Inheritance	Family Gifted Deposit	Equity Gifted Deposit	Builder Vendor Deposit	Personal/ Secured Loan	Capital raising from another property
£	£	£	£	£	£	£	£	£

Other (if other, please provide details)	Country of Deposit

If remortgage, how are funds being used?								
Debt Consolidation	Repay Existing Mortgage	Home Improvements	Holiday	Car Purchase	Invest in / Purchase Business	Buy to Let Investment	Holiday Home	Purchase Equity
£	£	£	£	£	£	£	£	£
Redemption Costs £		Other (if other, please provide details)						

APPLICANT DETAILS

	Applicant 1	Applicant 2
Title		
First Name		
Middle Name		
Surname		
Date of Birth	D D M M Y Y Y Y	D D M M Y Y Y Y
National Insurance Number		
Estimated Retirement Age		
Gender		
Nationality		
Permanent Right to Reside in the UK	Yes ☐ No ☐	Yes ☐ No ☐
Does the applicant require any of following Visas to work in the UK (Visas must have 6 months remaining at application)?*		
For how long has the applicant held a Visa to work in the UK	Years Months	Years Months
Length of Residency	Years Months	Years Months
Resident in the UK from birth	Yes ☐ No ☐	Yes ☐ No ☐
Diplomatic Immunity	Yes ☐ No ☐	Yes ☐ No ☐

Marital status (choose one):	Applicant 1	Applicant 2
Single	☐	☐
Married	☐	☐
Civil Partnership	☐	☐
Divorced	☐	☐
Separated	☐	☐
Living with Partner	☐	☐
Common Law	☐	☐
Annulled Civil	☐	☐
If the applicant has been known by another name in the last 6 years, please provide full details (including title)		

Address Details & History (please provide address history to cover the last 3 years)		Applicant 1	Applicant 2
Current Address	Address Line 1		
	Address Line 2		
	County		
	Postcode		
	Length of time at this address	Years Months	Years Months
	Residential Status at this address (choose one)	Owner with Mortgage ☐	Owner with Mortgage ☐
		Owner without Mortgage ☐	Owner without Mortgage ☐
		Renting – Private Landlord ☐	Renting – Private Landlord ☐
		Renting – Local Authority/ Social Landlord ☐	Renting – Local Authority/ Social Landlord ☐
		Renting – Letting Agent ☐	Renting – Letting Agent ☐
		Living with Relatives ☐	Living with Relatives ☐
		Living with Friends ☐	Living with Friends ☐

		Applicant 1		Applicant 2	
Previous Address	Address Line 1				
	Address Line 2				
	County				
	Postcode				
	Length of time at this address	Years	Months	Years	Months
	Residential Status at this address (choose one)	Owner with Mortgage	☐	Owner with Mortgage	☐
		Owner without Mortgage	☐	Owner without Mortgage	☐
		Renting – Private Landlord	☐	Renting – Private Landlord	☐
		Renting – Local Authority/ Social Landlord	☐	Renting – Local Authority/ Social Landlord	☐
		Renting – Letting Agent	☐	Renting – Letting Agent	☐
		Living with Relatives	☐	Living with Relatives	☐
		Living with Friends	☐	Living with Friends	☐

		Applicant 1		Applicant 2	
Previous Address	Address Line 1				
	Address Line 2				
	County				
	Postcode				
	Length of time at this address	Years	Months	Years	Months
	Residential Status at this address (choose one)	Owner with Mortgage	☐	Owner with Mortgage	☐
		Owner without Mortgage	☐	Owner without Mortgage	☐
		Renting – Private Landlord	☐	Renting – Private Landlord	☐
		Renting – Local Authority/ Social Landlord	☐	Renting – Local Authority/ Social Landlord	☐
		Renting – Letting Agent	☐	Renting – Letting Agent	☐
		Living with Relatives	☐	Living with Relatives	☐
		Living with Friends	☐	Living with Friends	☐
Additional Address Information					

Additional Notes:

VULNERABILITIES

There are many circumstances that mean customers would like us to support them differently today, in the future, or on an ongoing basis. If they share this information with us, we'll take the time to understand their needs and work with you and them to support those needs.

We will also use the information provided to help us develop our products and support options to help improve outcomes for all our customers. No data which will identify your client will be used in these circumstances.

Characteristics of vulnerability disclosed will not be used to determine whether or not a loan can be granted.

Does the applicant have any vulnerable characteristics that may require additional support from The Mortgage Lender?	Yes ☐ No ☐ Prefer not to say ☐
Does the applicant consent to disclosing this vulnerable characteristic to The Mortgage Lender?	Yes ☐ No ☐
Details	

SPECIAL REQUIREMENTS

Does the applicant require printed communication in a different format?	Yes ☐ No ☐
Please select required format, if applicable	Braille ☐ Audio ☐ Large Print ☐

EMPLOYMENT

Employment Status	Applicant 1	Applicant 2
Employed	Yes ☐ No ☐	Yes ☐ No ☐
Self-Employed	Yes ☐ No ☐	Yes ☐ No ☐
Fixed Term Contract	Yes ☐ No ☐	Yes ☐ No ☐
Retired	Yes ☐ No ☐	Yes ☐ No ☐
Unemployed	Yes ☐ No ☐	Yes ☐ No ☐
Homemaker	Yes ☐ No ☐	Yes ☐ No ☐
More than 25% share owner or Partner with less than 4 Partners in the firm?	Yes ☐ No ☐	Yes ☐ No ☐
Employed by a family member?	Yes ☐ No ☐	Yes ☐ No ☐
Has contract previously been renewed?	Yes ☐ No ☐	Yes ☐ No ☐
Renewal of contract or alternative been secured?	Yes ☐ No ☐	Yes ☐ No ☐

Employed Occupation & Income	Applicant 1	Applicant 2
Full-time	Yes ☐ No ☐	Yes ☐ No ☐
Occupation		
Start date of employment	D D M M Y Y Y Y	D D M M Y Y Y Y
Basic salary (annual income)	£	£
Overtime	£	£
Commission	£	£
Bonus	£	£
Car allowance	£	£
Other allowances	£	£

Does the applicant have any deductions from their salary?

Deduction Type – Monthly Amount	Applicant 1	Applicant 2
Student Loan	£	£
Pension	£	£
Other gross deductions	£	£

Previous Employment (if current employment is less than 12 months)	Applicant 1	Applicant 2
Occupation		
Start date	M M Y Y Y Y	M M Y Y Y Y

EMPLOYMENT

Secondary Income – Secondary Employment Status	Applicant 1	Applicant 2
Employed	Yes ☐ No ☐	Yes ☐ No ☐
Self-Employed	Yes ☐ No ☐	Yes ☐ No ☐
Fixed Term Contract	Yes ☐ No ☐	Yes ☐ No ☐
Retired	Yes ☐ No ☐	Yes ☐ No ☐
Unemployed	Yes ☐ No ☐	Yes ☐ No ☐
Homemaker	Yes ☐ No ☐	Yes ☐ No ☐
More than 25% share owner or Partner with less than 4 Partners in the firm?	Yes ☐ No ☐	Yes ☐ No ☐
Full time	Yes ☐ No ☐	Yes ☐ No ☐
Fixed contract?	Yes ☐ No ☐	Yes ☐ No ☐
Has contract previously been renewed?	Yes ☐ No ☐	Yes ☐ No ☐
Renewal of contract or alternative been secured?	Yes ☐ No ☐	Yes ☐ No ☐

Secondary Occupation & Income	Applicant 1	Applicant 2
Full-time	Yes ☐ No ☐	Yes ☐ No ☐
Occupation		
Start date of employment	M M Y Y Y Y	M M Y Y Y Y
Basic salary	£	£
Overtime	£	£
Commission	£	£
Bonus	£	£
Car Allowance	£	£
Other Allowances	£	£

Does the applicant have any deductions from their salary?

Deduction Type – Monthly Amount	Applicant 1	Applicant 2
Student Loan	£	£
Pension	£	£
Other gross deductions	£	£

Self-Employment – please provide your confirmed income for at least 1 year (please provide 2 years of confirmed income if available)

	Applicant 1	Applicant 2
Ownership Type		
Occupation		
Industry		
Date Commenced Trading	M M Y Y Y Y	M M Y Y Y Y
Percentage of Business Owned		
SA302 Income OR Directors Salary	£	£
Year ending	M M Y Y Y Y	M M Y Y Y Y
Share of profit before tax		
Year ending	M M Y Y Y Y	M M Y Y Y Y

Other Sources of Income

	Applicant 1	Applicant 2
Investment	£	£
Dividends/Drawings	£	£
Pension (Private / Company / State)	£ / /	£ / /
Maintenance	£	£
Child Benefit	£	£
Working Tax Credit / Child Tax Credit / Universal Credit equivalent	£	£
Other (Please provide details)		

Lending into Retirement (if the loan extends beyond retirement, please complete the following sections) Source of Income (Retired)

	Applicant 1	Applicant 2
State Pension	£	£
Private Pension	£	£
Investment Income	£	£
Other (Please provide details)		

Does the applicant foresee any changes in the level of their income or expenditure which may affect their ability to meet mortgage repayments? If yes, please provide details below:

COMMITMENTS

Credit Commitments for joint applicants – if mortgages or other commitments are shared the information should be given only once		
	Applicant 1	**Applicant 2**
Monthly Rental Commitment (if applicable)	£	£
Current Residential Mortgages		
To be redeemed on completion	Yes ☐ No ☐	Yes ☐ No ☐
Reasons for not redeeming on completion		
Property to be let	Yes ☐ No ☐	Yes ☐ No ☐
Property Unencumbered	Yes ☐ No ☐	Yes ☐ No ☐
Other (provide details)		
Monthly residential mortgage repayment	£	£
Residential mortgage balance outstanding	£	£
Estimated value of current residential property	£	£
Current mortgage lender		
Account number		

Mortgage & Secured Loan History		
	Applicant 1	**Applicant 2**
Does the applicant have any other Mortgages or Secured Loans (not BTL)?	Yes ☐ No ☐	Yes ☐ No ☐
Outstanding Balance (for each loan)	£	£
Monthly Payment (for each loan)	£	£
End Date (for each loan)	M M Y Y Y Y	M M Y Y Y Y
Repay on Completion	Yes ☐ No ☐	Yes ☐ No ☐

Store/Credit Cards

Applicant	Card Provider	Last 4 digits of card number	Balance	To be repaid on completion?	Sources of funds for repayment
			£	Yes ☐ No ☐	
			£	Yes ☐ No ☐	
			£	Yes ☐ No ☐	

Loan & Hire Purchase

Applicant	Lender	Account No	Balance	Monthly Payments	End Date mm/yy	To be repaid on completion?	Sources of funds for repayment
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	

Mail Order accounts

Applicant	Lender	Account No	Balance	Monthly Payments	End Date mm/yy	To be repaid on completion?	Sources of funds for repayment
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	

Debt management plans

Applicant	Lender	Account No	Balance	Monthly Payments	End Date mm/yy	To be repaid on completion?	Sources of funds for repayment
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	
			£		/	Yes ☐ No ☐	

Other commitments (non-lifestyle)

	Applicant 1		Applicant 2	
Commitment type	Monthly payment	End date	Monthly payment	End date
Maintenance/Alimony	£	M M Y Y Y Y	£	M M Y Y Y Y
School Fees	£	M M Y Y Y Y	£	M M Y Y Y Y
Child Care	£	M M Y Y Y Y	£	M M Y Y Y Y
Court Fines	£	M M Y Y Y Y	£	M M Y Y Y Y
Ground Rent Charges	£	M M Y Y Y Y	£	M M Y Y Y Y

Buy to Let	Applicant 1	Applicant 2
Does the applicant own any investment/ buy-to-let properties?	Yes ☐ No ☐	Yes ☐ No ☐
Total number of properties		
Estimated value of portfolio	£	£
Total outstanding balance of mortgages	£	£
Total monthly portfolio rental income	£	£
Total monthly portfolio mortgage payments	£	£
Is the portfolio managed by an agent on the applicant's behalf?	Yes ☐ No ☐	Yes ☐ No ☐

Dependants for all applicants		
No. of non-applicant adult dependants		
No. of child dependants over 5 years of age		
No. of child dependants under 5 years of age		

PROPERTY DETAILS

Property Address	
Address Line 1	
Address Line 2	
Address Line 3	
County	
Postcode	

Property Description											
House	☐	Bungalow	☐	Flat	☐	Studio Flat	☐	Maisonette	☐	Other	☐

Property Type											
Detached	☐	Semi-detached	☐	End Terraced	☐	Mid Terraced	☐	Back to Back	☐	Other	☐

Certificate Type (if less than 10 years old)											
NHBC	☐	Zurich Municipal	☐	Building Life Plan Scheme	☐	Premier Guarantee	☐	Architects Certificate	☐	No Warranty	☐
Other	☐										

Rooms		
No. of Bedrooms	No. of Bathrooms	No. of Kitchens

Tenure							
Freehold	☐	Leasehold	☐	Commonhold	☐	Heritable	☐

Type of Purchase						
Private ☐	Purchase from Local Authority ☐	Purchase from Housing Association ☐	Purchase at Auction ☐	Purchase from Landlord as Tenant ☐	Purchase from Builder ☐	Purchase from Relative ☐

Years remaining on lease (if applicable)			
Number of storeys in building (Flats/Apartments)			
Floor number of flat (Flats/Apartments)			
Does property have a lift?			Yes ☐ No ☐
Is property a new build?			Yes ☐ No ☐
Year of construction			M M Y Y Y Y
Is the property connected to or above a commercial property? (If yes, please provide details)	Yes ☐	Details	No ☐
Is any of the property to be used for commercial purposes? (If yes, for what type of business?)	Yes ☐	Details	No ☐
Standard construction?	Yes ☐	Details	No ☐
Is the property ex-social housing?			Yes ☐ No ☐
Does the property include more than three acres of land?			Yes ☐ No ☐
EPC Rating			

TML Fees	Added to Loan
Completion Fee	Yes ☐ No ☐
Telegraphic Transfer Fee	Yes ☐ No ☐

Other Fees	Intermediary Fee	Specialist Distributor Fee
Fee Amount	£	£
When payable (tick appropriate)	On Application ☐	On Application ☐
	On Offer ☐	On Offer ☐
	On Completion ☐	On Completion ☐
How payable?	Paid to Broker ☐	Paid to Broker ☐
Refundable amount	£	£

Contact Details	Applicant 1	Applicant 2
Home Telephone Number		
Work Telephone Number		
Mobile Telephone Number		
Email Address		

Keeping your client informed

The Mortgage Lender and its group of companies would like to keep your client informed of products, services, and member offers that we consider relevant to them. We will not share their information with external companies for the purpose of marketing.

To confirm whether or not your client wishes to be contacted by a particular method, please select 'Yes' or 'No' in the boxes below:

	Applicant 1	Applicant 2
Please contact by phone	Yes ☐ No ☐	Yes ☐ No ☐
Please contact by mail	Yes ☐ No ☐	Yes ☐ No ☐
Please contact by email	Yes ☐ No ☐	Yes ☐ No ☐
Please contact by SMS	Yes ☐ No ☐	Yes ☐ No ☐

Current Employment Contact Details	Applicant 1	Applicant 2
Company Name		
Address 1		
Address 2		
Address 3		
Postcode		
Telephone Number		
Employed by a family member?	Yes ☐ No ☐	Yes ☐ No ☐

Self-Employment Contact Details	Applicant 1	Applicant 2
Company Name		
Telephone Number		
Address Line 1		
Address Line 2		
Address Line 3		
Postcode		
Accountant used to prepare accounts?	Yes ☐ No ☐	Yes ☐ No ☐
Accountant Company		
Accountant Contact Name		
Accountant Qualification		
How long has the Accountant acted for the applicant?	Years Months	Years Months
Accountant Address 1		
Accountant Address 2		
Accountant Address Line 3		
Accountant Postcode		

Landlord Details	Applicant 1	Applicant 2
Landlord Name		
Address 1		
Address 2		
Address 3		
Postcode		
Date Tenancy Commenced	D D M M Y Y Y Y	D D M M Y Y Y Y

Arrangements for Property Access	
Provide details for the valuer to gain access to inspect the property:	
Contact Name	
Contact Type (Applicant, Builder, Vendor)	
Telephone Number	
Email address	
Any additional access information	

Other Occupants		
Upon completion, will there be any other occupants living at the property who are aged 17 or over?		Yes ☐ No ☐
If yes:	**Occupant 1**	**Occupant 2**
Name(s)		
Date of Birth	D D M M Y Y Y Y	D D M M Y Y Y Y
Relationship to applicant		
Name(s)		
Date(s) of Birth	D D M M Y Y Y Y	D D M M Y Y Y Y
Relationship to applicant		

CONVICTIONS

	Applicant 1	Applicant 2
Do the applicants have any criminal convictions other than those which are spent under the Rehabilitation of Offenders Act 1974 (or equivalent), or any pending prosecutions relation to any aspect of dishonesty, such as theft, robbery, fraud, or arson; which may have bearing on your future employment or likely conduct of the mortgage?	Yes ☐ No ☐	Yes ☐ No ☐

SOLICITOR DETAILS

TML operates a solicitor panel and will appoint a solicitor to act on both its behalf and on behalf of the applicant. If the applicant wishes separate legal representation to act on their behalf, full details of the solicitor acting on behalf of the applicant should be captured. By choosing to have separate legal representation, the applicant(s) will be liable for both sets of legal fees.

Does the applicant wish to use The Mortgage Lender appointed solicitor? If no, please provide the applicant's solicitor details below.	Yes ☐ No ☐
Solicitor's Firm Name	
Solicitor's Name	
Address 1	
Address 2	
Postcode	
Contact Telephone Number	
Fax Number	
Email Address	
DX Number	

Customer Direct Debit Details	
Bank Sort Code	– –
Account Number	
Account Holder Name	

ADDITIONAL NOTES

Other Fees

INTERMEDIARY ENQUIRIES 0344 257 0418
WWW.THEMORTGAGELENDER.COM

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THE MORTGAGE LENDER
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THANKS
FOR CHECKING.

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Our Buy to Let mortgages are not regulated by the Financial Conduct Authority. Registered in England & Wales as company number 9280057.
Registered office address: Floor 10, 40 Leadenhall Street, London EC3A 2BJ.