The mortgage works

Offline Data Capture

This form is for intermediaries' internal use only and is not approved for issuing to customer(s). The information on this form may be used to assist the intermediary if an application is made to The Mortgage Works. Before you complete this form for the applicant, please make sure they have seen 'How The Mortgage Works and Nationwide use your information' by visiting **themortgageworks.co.uk/intermediaries/cookies-privacy**

This section to be completed by the Introducer (if applicable)

First name

Surname

Company name

Address

Postcode

Network/Club if applicable

Packager if applicable

Amount of booking fee being collected? (if applicable) £

Amount of valuation fee being collected? £

When is fee payable? On application ☐ On completion ☐

Will you be charging the applicant(s) a fee? Yes ☐ No ☐

Amount of fee? £

When is the fee payable?

On application ☐ On offer ☐ On completion ☐

Is the fee refundable? Yes ☐ No ☐

Amount of fee refundable? £

Panel number (if known)

Telephone number

Email Address

Firm FCA/PRA ref. no.

Appointed representatives No ☐ Yes ☐

Name of principal

Principal FCA/PRA firm ref. no.

Address of principal

Postcode

Email Address

Telephone number

Will a third party be charging the applicants a fee for arranging this mortgage? Yes ☐ No ☐ If yes, please state below the fee charged, name of the organisation, whether the fee is payable on application or completion and under which terms a refund will be made:

Fee	£	Fee	£
Organisation		Organisation	
When payable		When payable	
Refund terms		Refund terms	

Are procuration fees to be shared with any other person or organisation? Yes ☐ No ☐

If yes please state amount £ and name/organisation

£

Have you met the applicant(s)? Yes ☐ No ☐

Has mortgage advice been given? Yes ☐ No ☐

Who provided the advice?

I have explained to my client(s) that email communication is not 100% secure. However, my client(s) request that you send their mortgage processing documentation to me by email. ☐

I confirm that I have/my company has the necessary permissions from the FCA/PRA to advise (where applicable), complete and submit this application on behalf of my/our clients.

I confirm that all documents provided, whether electronically attached or posted, are genuine copies or photographic images of the original documents that have been seen by me and (where appropriate) my client(s) have authorised me to take and provide you with photographic images of the documents provided.

Any fee received from The Mortgage Works solely relates to the introduction of the mortgage. I can confirm that I have referred to The Mortgage Works Lending Policy, relating to the application, property and applicant(s) and that all eligibility criteria have been met.

Signature of Introducer

Date D D M M Y Y Y Y

First Applicant and Second Applicant Personal Details

Applicant(s) Personal Details	First Applicant Director ☐ Director/Shareholder ☐	Second Applicant Director ☐ Director/Shareholder ☐ Shareholder ☐
Title		
First name		
Middle name(s)		
Surname		
Gender	Male ☐ Female ☐	Male ☐ Female ☐
Date of birth	D D M M Y Y Y Y	D D M M Y Y Y Y
Marital status	Single ☐ Married/Civil Partner ☐ Widow/er ☐ Divorced ☐	Single ☐ Married/Civil Partner ☐ Widow/er ☐ Divorced ☐
Nationality		
Does your client have dual nationality?	Yes ☐ No ☐	Yes ☐ No ☐
If yes, which country? (the dual nationality country must be different to nationality)		
Country of birth		
What type of buyer are you?	First time landlord ☐ Experienced landlord ☐	First time landlord ☐ Experienced landlord ☐
If a first time landlord (and not a Let to Buy application) or an experienced landlord and they solely/jointly own only 1 mortgaged BTL property and no unencumbered properties, is the property inherited?	Yes ☐ No ☐	Yes ☐ No ☐
If a first time landlord (and not a Let to Buy application) or an experienced landlord and they solely/jointly own only 1 mortgaged BTL property and no unencumbered properties, have you or a related person ever lived in the property?	Yes ☐ No ☐	Yes ☐ No ☐
Has client ever been known by another name in the last three years?	Yes ☐ No ☐ If yes, please state below Mr ☐ Mrs ☐ Miss ☐ Other ☐ Other (specify) Forenames Surname From D D M M Y Y Y Y To D D M M Y Y Y Y	Yes ☐ No ☐ If yes, please state below Mr ☐ Mrs ☐ Miss ☐ Other ☐ Other (specify) Forenames Surname From D D M M Y Y Y Y To D D M M Y Y Y Y

Applicant(s) Current Address Details

	First Applicant	Second Applicant
Address	Postcode	Postcode
Country		
Residential status at current address	Joint tenant ☐ Single tenant ☐ Owner with mortgage ☐ Owner without mortgage ☐ Living with friends ☐ Living with partner ☐ Living with relatives ☐	Joint tenant ☐ Single tenant ☐ Owner with mortgage ☐ Owner without mortgage ☐ Living with friends ☐ Living with partner ☐ Living with relatives ☐
Date moved in MM/YYYY	D D M M Y Y Y Y	D D M M Y Y Y Y

Applicant(s) Current Address Details (continued)

	First Applicant	Second Applicant
If 'owner with mortgage' or 'owner without mortgage' and purchasing a new property, please complete the following 4 questions:		
Current property value of this address	£	
Type of property	House detached ☐ House semi-detached ☐ House mid-terrace ☐ House end-terrace ☐ Bungalow detached ☐ Bungalow semi-detached ☐ Bungalow mid-terrace ☐ Bungalow end-terrace ☐	Flat purpose built ☐ Flat converted ☐ Flat studio ☐ Maisonette purpose built ☐ Maisonette converted ☐
Number of bedrooms		
Outstanding mortgage balance	£	
Telephone numbers (including area code)	Work Home Mobile	Work Home Mobile
Please state a convenient time to contact	am ☐ pm ☐ at home ☐ at work ☐	am ☐ pm ☐ at home ☐ at work ☐
Email address		
Preferred method of contact		
Do the applicant(s) prefer correspondence in a special format?	Audio CD ☐ Braille ☐ Large Print ☐	Audio CD ☐ Braille ☐ Large Print ☐
Are the applicants' or directors' current addresses to be used as their correspondence address?	Yes ☐ No ☐	Yes ☐ No ☐
If the answer is no, please give the correspondence address below, along with the reason.		
Address	Postcode	Postcode
Country		
Reason		
Home phone number		
Work phone numbe		
Mobile phone number		
Email address		
Preferred method of contact		

Please tell the applicant we'll sometimes use this email address and/or phone number(s) to get in touch with them about their application, or tell them something important about their account.

Please provide a full 3 year address history, dating back 3 calendar years, starting with the most recent address.

	First Applicant	Second Applicant
Previous address and postcode	Postcode	Postcode
Date moved in MM/YYYY	M M Y Y Y Y	M M Y Y Y Y

Applicant(s) Current Address Details (continued)

	First Applicant	Second Applicant
Residential status at previous address	Joint tenant ☐ Single tenant ☐ Owner with mortgage ☐ Owner without mortgage ☐ Living with friends ☐ Living with partner ☐ Living with relatives ☐	Joint tenant ☐ Single tenant ☐ Owner with mortgage ☐ Owner without mortgage ☐ Living with friends ☐ Living with partner ☐ Living with relatives ☐
Previous address and postcode	Postcode	Postcode
Date moved in MM/YYYY	M M Y Y Y Y	M M Y Y Y Y
Residential status at previous address	Joint tenant ☐ Single tenant ☐ Owner with mortgage ☐ Owner without mortgage ☐ Living with friends ☐ Living with partner ☐ Living with relatives ☐	Joint tenant ☐ Single tenant ☐ Owner with mortgage ☐ Owner without mortgage ☐ Living with friends ☐ Living with partner ☐ Living with relatives ☐

Income Details

	First Applicant	Second Applicant
Gross annual rental income	£	£
Does the applicant receive an income from any sources other than rental?	Yes ☐ No ☐	Yes ☐ No ☐
If Yes please provide the annual income from this source	£	£
Employment status	Employed ☐ Self-employed ☐ Retired ☐ House person ☐ Not working ☐	Employed ☐ Self-employed ☐ Retired ☐ House person ☐ Not working ☐

Employed Applicants/Directors

	First Applicant	Second Applicant
Employers name		
Job role		
Industry		
Gross annual income from employment	£	£
Job Title		
Employers Address	Postcode	Postcode
Length of employment	Months ☐ Years ☐	Months ☐ Years ☐

Self-employed Applicants/Directors

	First Applicant	Second Applicant
Name of business		
Job role		
Industry		
Annual income from self employment	£	£
Please only complete these questions if you are a Director:		
How many directorships do you currently hold?		
Please provide the taxable income figure	£	£
If accountant's reference selected please provide your accountant's name		
Please provide accountants email		
Retired Applicants		
Annual pension income	£	£
Name of previous employer		
Previous employer's business type (e.g. financial services/construction/public sector)		
Previous job title		

Company Details (only for applications in company names – this section must be fully completed)

We only accept applications from UK Limited companies where the Directors undertake to restrict the company's activities to the buying, selling and renting of residential investment properties. Layered companies are not eligible. Personal guarantees are required from all beneficial owners in in all cases.

Company name	
Registered office	
Will this be your correspondence address?	Yes ☐ No ☐ If no please give details in section xx
Trading address	
If the registered and trading addresses are different, please provide an explanation	
Company registration number	
Telephone number (inc. area code)	
Is the company a Special Purpose Vehicle (SPV) set up solely for the purpose of buying, letting and selling of residential property?	Yes ☐ No ☐ If Yes, please answer question xx

Note: to confirm a company's nature of business, each company will have one or more Standard Industrial Classification (SIC) code(s) associated with it. TMW only accepts SPV's with one or more of the following SIC codes: 68100, 68201, 68209, 68320

Does the SPV only have one or more of the above SIC codes associated with it?	Yes ☐ No ☐	
Does the SPV have any commercial property/ assets within it?	Yes ☐ No ☐	
Nature of Business		
Date incorporated		
Please list all directors and shareholders of the company and list the percentage of issued shares they hold		%
		%

Portfolio Details

	First Applicant	Second Applicant
Please confirm the number of Buy to Let properties on completion of this mortgage including: – Those held in a limited company – Any TMW purchase or let-to-buy application in progress	Number of properties on completion: Mortgaged ☐ Unencumbered ☐ These can be held by the applicant(s) solely or jointly, or with a 3rd party not linked to this application.	Number of properties on completion: Mortgaged ☐ Unencumbered ☐ These can be held by the applicant(s) solely or jointly, or with a 3rd party not linked to this application.
Total estimated value of portfolio	£	
Total borrowing secured against the portfolio	£	

Mortgage Details

Is this application for a regulated mortgage?	Regulated ☐	Non regulated/ Consumer Buy to Let ☐
Loan purpose	House purchase ☐ Remortgage ☐ Remortgage capital raising ☐	House purchase ☐ Remortgage ☐ Remortgage capital raising ☐
Loan amount required	£	
How do you want to pay the product fee?	Add to loan ☐	Deduct from advance ☐
Product	Product code	Interest rate
Loan term (years)		
Repayment basis	Repayment £	Interest only £

Purchase applications

Purchase price of the security	£	
Estimated value	£	
Please state the source(s) of deposit	UK Savings Amount ☐	Amount £
	Equity / sales proceeds ☐	
	Address of property	
	Inheritance Amount ☐	Amount £
	Non repayable gift ☐	from
		Amount £
	UK stocks / shares Amount ☐	Amount £
	Overseas savings / stocks / shares ☐	Amount £
	Business / company ☐	Amount £
	Please provide details:	
	Business / company name	
	Intercompany loan Amount ☐	Amount £
	Name of the Company providing funds	
	Vendor cashback* ☐	Amount £
	Builder's cashback* ☐	Amount £
	*only one may be selected	
Is the property vendor a limited company?	Yes ☐ No ☐	
Is the property being sold via an estate agent?	Yes ☐ No ☐	

If the property isn't being sold via an estate agent, please provide the following details:

Does the vendor intend to reside in the property after completion?	Yes ☐ No ☐
What's the clients relationship to the vendor?	
Will the property be purchased at full market value?	Yes ☐ No ☐
How was the property sourced?	

Is full vacant possession being obtained on completion?	Yes ☐ No ☐
Is the vendor a limited company?	Yes ☐ No ☐
If yes, what is the company name and company address	
Business Type (e.g financial services/construction/public sector)	
Are you connected to this company?	Yes ☐ No ☐

Remortgage/ Remortgage with capital raising applications

Date of purchase	D D M M Y Y Y Y
Original Purchase Price	£
Was the property purchased from a Limited Company?	Yes ☐ No ☐ (If yes, please provide the name of the Limited Company. Are you connected to this limited company? Yes ☐ No ☐
Estimated value of the security	£
Total value of existing mortgage to be repaid (please include all lending secured against the property)	£
Is this a let to buy application?	Yes ☐ No ☐
Please confirm the amount of capital raising (if applicable):	Amount of capital raising (if applicable): Amount £ Please confirm purpose of capital raising: Debt consolidation ☐ Amount £ Home improvements (security address) ☐ Amount £ Provide a description of the improvements Home improvements (other property) ☐ Amount £ Provide a description of the improvements Property purchase ☐ Amount £ Purchase of land ☐ Amount £ Transfer of equity ☐ Amount £ Purchase of final share (shared ownership) ☐ Amount £ Other ☐ Amount £ If other, please provide details

Let to Buy - only complete this section for Let to Buy applications

Does the applicant have an onward residential address?	Yes ☐ No ☐
Is the onward residential purchase being fully or partially funded by a mortgage?	Yes ☐ No ☐
The Let to Buy onward residential address:	
Please confirm the purchase price of the onward residential purchase	£
Selling agent's name	

Porting – only complete this section if you are porting

Mortgage account number for the product to be ported	
Loan amount to be ported / loan term (years)	
Additional borrowing product code	
Additional borrowing amount / loan term (years)	

Director Residential Purchase

Does the Director/Shareholder(s) have an onward residential address?	Yes ☐ No ☐
Will the Director/Shareholder(s) be renting their onward residential address?	Yes ☐ No ☐
Onward Residential address	
Purchase price of the onward residential address	£
Selling agents name	

New Company Address

Is the property purchase address currently used as the company's registered address?	Yes ☐ No ☐
New registered address for the company	

Property Details

Does the property have a valid Energy Performance Certificate (EPC) that satisfies current regulation for a private rented property?	Yes ☐ No ☐ The Mortgage Works requires private rented properties to have a valid Energy Performance Certificate (EPC). Please visit the website themortgageworks.co.uk for further information.
Property address	
Is the property an HMO?	Yes ☐ No ☐
Type of property	House detached ☐ Flat purpose built ☐ House semi-detached ☐ Flat converted ☐ House mid-terrace ☐ Flat studio ☐ House end-terrace ☐ Maisonette purpose built ☐ Bungalow detached ☐ Maisonette converted ☐ Bungalow semi-detached ☐ Bungalow mid-terrace ☐ Bungalow end-terrace ☐
Tenure	Freehold ☐ Leasehold ☐ Ownership Scotland ☐ Commonhold ☐
If leasehold – unexpired lease term	
– annual ground rent	£
– annual service charge	£
Is the property a new build?	Yes ☐ No ☐
Year built	
Standard construction	Yes ☐ No ☐
Was the property ever owned by a local authority or housing association?	Yes ☐ No ☐
Does the property have agricultural ties?	Yes ☐ No ☐
Number of bedrooms (If number of bedrooms is zero (i.e. studio flat), input 1)	
Number of kitchens	
Number of reception and/ or communal rooms	
Type of garage	No garage ☐ Single ☐ Single integral ☐ Double ☐ Double integral ☐ Other ☐
If the property is a flat or maisonette, please confirm the number of floors in the building	

Planned major works Please note, significant changes to the structure/configuration of the property such as an extension, changes to the internal walls, or any other works you think may be considered significant may impact our lending decision. You'll be asked to leave details of any planned works in the notes section at the end of the online application.	Yes ☐ No ☐
Has the property ever been owned by the Local Authority?	Yes ☐ No ☐

Tenancy Details

What is the actual or anticipated monthly rental income?	£
Is this a corporate let?	Yes ☐ No ☐
If this is a corporate let, please provide the name of the tenant	
How does your client intend to let the property?	Assured Tenancy ☐ Short Assured Tenancy ☐ Occupation Contract ☐ Non-Standard ☐ Private Residential Tenancy ☐

Direct Debit Details

	First Applicant	Second Applicant
Account number		
Sort code (xx-xx-xx)		
Name(s) of account holder(s)		

Conveyancer Details

Name of firm	
Address	
Name of contact	
E-mail address	
Telephone number	
Sole practitioner	Yes ☐ No ☐

Valuation and Access Details

Type of valuation required	Valuation for mortgage ☐ Home Survey Level 2 and Valuation ☐ Home Survey Level 3 ☐ Specialist Security Valuation ☐
Property access contact	
Address	
Contact telephone number	
Secondary contact telephone number	
Valuation / access (other contact details)	Is this the selling agent Yes ☐ No ☐ Is this the managing agent? Yes ☐ No ☐ If no, please provide the following details for the managing / selling agent Company name: Address/postcode: Telephone number: **NOTE: This information may help us with gaining access to the property to carry out the valuation**

themortgageworks.co.uk

Telephone: **0345 606 4060**

T184 (07-2026)