

# Manual Mortgage Illustration Form

Please return to [kfi@themortgageworks.co.uk](mailto:kfi@themortgageworks.co.uk)

Before you complete this form, please see 'How The Mortgage Works and Nationwide use your information' by visiting [themortgageworks.co.uk/cookies-privacy](https://themortgageworks.co.uk/cookies-privacy)

Please select the reason for the manual mortgage illustration from the following list:

## 1. Broker's Address

Address Line 1	<input type="text"/>		
Address Line 2	<input type="text"/>		
Address Line 3	<input type="text"/>		
Town/City	<input type="text"/>		
County	<input type="text"/>	Postcode	<input type="text"/>

## 2. General Details

Advance Type	<input type="text"/>
Maximum LTV for application type	<input type="text"/>
Regulatory status of this application (Help)	<input type="text"/>
Mortgage Account No. (Further advance or transfer of equity cases)	<input type="text"/>
Purpose of Further Advance (if applicable)	<input type="text"/>

## 3. Company / FCA Registration / Proc Fees

FCA Registration number	<input type="text"/>
Company name	<input type="text"/>
FCA Level of Service	<input type="text"/>
Confirm your mortgage club / network (Only if directly authorised by FCA)	<input type="text"/>
Please confirm your network (Appointed rep only)	<input type="text"/>
Please state packagers name (If applicable)	<input type="text"/>

## 4. Adviser Details / Company Fees

Mortgage adviser's name	<input type="text"/>		
Contact telephone number	<input type="text"/>		
Email address for mortgage illustration if for a Further Advance	<input type="text"/>		
Are you charging the applicant a fee?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If so how much?	£ <input type="text"/>
When is this fee payable?	<input type="text"/>		
Is this fee refundable, and if so under what circumstances?	<input type="text"/>		

## 5. Applicant/s

	Applicant 1	Applicant 2 (only complete if applicable)
Title	<input type="text"/>	<input type="text"/>
Forenames	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
Limited Company name (Limited Company applications only)	<input type="text"/>	<input type="text"/>
Does the client have indefinite/permanent right to reside in the UK? (Non UK National only)	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

## 6. Property Details

Property value	<input type="text"/>
Loan amount	<input type="text"/>
Product code	<input type="text"/>
If rate is being loaded please state percentage of increase (%)	<input type="text"/>
Loan to Value (%)	<input type="text"/>
Term	<input type="text"/>
Repayment type	<input type="text"/>
If part and part – please state loan amount for Interest only	<input type="text"/>
If part and part – please state loan amount for repayment	<input type="text"/>
Existing TMW Account number (Porting or further advance only)	<input type="text"/>
Is your client borrowing additional money?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If 'Yes' what is the Total loan (Existing loan + further advance)	<input type="text"/>
Existing TMW Product code (Porting only)	<input type="text"/>

## 7. Portfolio Cases (Only complete if applicable)

No of properties to be purchased / remortgaged or added to a portfolio	<input type="text"/>			
Total loan amount	<input type="text"/>			
Total loan amount (Existing loan + additional money)	<input type="text"/>			
Please state the value of each property in the boxes opposite. This is required to calculate the valuation fee.	Property 1	<input type="text"/>	Property 2	<input type="text"/>
	Property 3	<input type="text"/>	Property 4	<input type="text"/>
	Property 5	<input type="text"/>	Property 6	<input type="text"/>
	Property 7	<input type="text"/>	Property 8	<input type="text"/>
	Property 9	<input type="text"/>	Property 10	<input type="text"/>
	Property 11	<input type="text"/>	Property 12	<input type="text"/>
	Property 13	<input type="text"/>	Property 14	<input type="text"/>
	Property 15	<input type="text"/>	Property 16	<input type="text"/>
	Property 17	<input type="text"/>	Property 18	<input type="text"/>
	Property 19	<input type="text"/>	Property 20	<input type="text"/>

Limited Company applications will incur a solicitor fee, per property, on behalf of TMW which must be paid up front.

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## 8. Fees

Arrangement fee

If arrangement fee is to be loaded please state percentage (%)

Is this mortgage illustration for a Limited Company application? (If yes complete section 7)

Yes ☐ No ☐

Please select the type of application fee required – this includes the valuation fee  
(This must to be paid up front)

If case is to be packaged please state valuation fee (If applicable)

Other fees your client will incur

Legal Fees – Unless part of product criteria this is an agreement between the client and  
their solicitor

**Please return completed form to [kfi@themortgageworks.co.uk](mailto:kfi@themortgageworks.co.uk)**