

Manual Mortgage Illustration Form

Please return to 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

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

1. Broker's Address

Address Line 1

Address Line 2

Address Line 3

Town/City

County Postcode

2. General Details

Advance Type

Regulatory status of this application (Help)

Mortgage Account No. (Further advance or transfer of equity cases)

Purpose of Further Advance (if applicable)

3. Company / FCA Registration / Proc Fees

FCA Registration number

Company name

FCA Level of Service

Confirm your mortgage club / network
(Only if directly authorised by FCA)

Please confirm your network
(Appointed rep only)

Please state packagers name
(If applicable)

4. Adviser Details / Company Fees

Mortgage adviser's name

Contact telephone number

Email address for mortgage illustration
if for a Further Advance

Are you charging the applicant a fee? Yes No If so how much? £

When is this fee payable?

Is this fee refundable, and if so under
what circumstances?

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" value="£"/>
Loan amount	<input type="text" value="£"/>
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	Repayment <input type="checkbox"/> Interest Only <input type="checkbox"/> Part and Part <input type="checkbox"/>
If part and part – please state loan amount for Interest only	<input type="text" value="£"/>
If part and part – please state loan amount for repayment	<input type="text" value="£"/>
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" value="£"/>
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" value="£"/>			
Total loan amount (Existing loan + additional money)	<input type="text" value="£"/>			
Please state the value of each property in the boxes opposite. This is required to calculate the valuation fee.	Property 1	<input type="text" value="£"/>	Property 2	<input type="text" value="£"/>
	Property 3	<input type="text" value="£"/>	Property 4	<input type="text" value="£"/>
	Property 5	<input type="text" value="£"/>	Property 6	<input type="text" value="£"/>
	Property 7	<input type="text" value="£"/>	Property 8	<input type="text" value="£"/>
	Property 9	<input type="text" value="£"/>	Property 10	<input type="text" value="£"/>
	Property 11	<input type="text" value="£"/>	Property 12	<input type="text" value="£"/>
	Property 13	<input type="text" value="£"/>	Property 14	<input type="text" value="£"/>
	Property 15	<input type="text" value="£"/>	Property 16	<input type="text" value="£"/>
	Property 17	<input type="text" value="£"/>	Property 18	<input type="text" value="£"/>
	Property 19	<input type="text" value="£"/>	Property 20	<input type="text" value="£"/>

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

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

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