

Intermediary Data Capture Form

For use by professional mortgage intermediaries only

Number of applicants	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4
Type of borrower	
<input type="checkbox"/> First time buyer <input type="checkbox"/> New customer moving house <input type="checkbox"/> Principality customer remortgage <input type="checkbox"/> New customer remortgage	<input type="checkbox"/> Principality customer moving house <input type="checkbox"/> BTL purchase <input type="checkbox"/> BTL remortgage <input type="checkbox"/> Other
Method of sale	
<input type="checkbox"/> Face-to-face <input type="checkbox"/> Telephone <input type="checkbox"/> Internet <input type="checkbox"/> Post	
Composition of mortgaged property	
Number of adults in property (excluding retired and non dependents)	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Number of retired adults	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Number of children	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Number of dependent adults	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Region of mortgaged property	
<input type="checkbox"/> North East <input type="checkbox"/> North West <input type="checkbox"/> Yorks <input type="checkbox"/> East Midlands <input type="checkbox"/> West Midlands <input type="checkbox"/> East <input type="checkbox"/> London <input type="checkbox"/> South East <input type="checkbox"/> South West <input type="checkbox"/> Wales	
Basic Essential Expenditure	
Food and drink	£
Council tax, utilities and household insurances	£
Transport	£
Communications	£
Health	£
Total	£
Quality of Living Costs	
Clothing and footwear	£
Household goods and services	£
Recreation	£
Education	£
Misc Expenditure	£
Total	£

Personal Details	Applicant 1	Applicant 2
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other (please specify) _____	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other (please specify) _____
First name		
Middle name(s)		
Surname		
Previous surname		
Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Date of birth (DD/MM/YYYY)		
Marital Status	<input type="checkbox"/> Single <input type="checkbox"/> Married/Civil Partnership <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Co-habiting <input type="checkbox"/> Unknown	<input type="checkbox"/> Single <input type="checkbox"/> Married/Civil Partnership <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Co-habiting <input type="checkbox"/> Unknown
What age do you intend to retire. Or if you're retired already, what age did you retire?		
Work phone number		
Home phone number		
Mobile phone number		
Email address	APPLICANT 1	
	APPLICANT 2	
Employment status	<input type="checkbox"/> Employed (Permanent – Full Time) <input type="checkbox"/> Employed (Permanent – Part Time) <input type="checkbox"/> Employed (Fixed Term Contract – Full Time) <input type="checkbox"/> Employed (Fixed Term Contract – Part Time) <input type="checkbox"/> Employed (Temporary – Full Time) <input type="checkbox"/> Employed (Temporary – Part Time) <input type="checkbox"/> Self-Employed <input type="checkbox"/> Not Employed <input type="checkbox"/> Retired <input type="checkbox"/> Full-Time Education <input type="checkbox"/> Homemaker <input type="checkbox"/> Other (Please specify) _____	<input type="checkbox"/> Employed (Permanent – Full Time) <input type="checkbox"/> Employed (Permanent – Part Time) <input type="checkbox"/> Employed (Fixed Term Contract – Full Time) <input type="checkbox"/> Employed (Fixed Term Contract – Part Time) <input type="checkbox"/> Employed (Temporary – Full Time) <input type="checkbox"/> Employed (Temporary – Part Time) <input type="checkbox"/> Self-Employed <input type="checkbox"/> Not Employed <input type="checkbox"/> Retired <input type="checkbox"/> Full-Time Education <input type="checkbox"/> Homemaker <input type="checkbox"/> Other (Please specify) _____
National Insurance number		
Nationality		
Is applicant an existing Principality customer?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

FUTURE MARKETING TO YOU

From time to time Principality may provide you with information regarding existing or new similar products and services offered by them (including but not limited to mortgage lending, savings, general insurance and financial services) their associated companies or their insurance and financial services partners.

If you would like to receive this information, you can choose how by ticking the boxes below:

Applicant 1	<input type="checkbox"/> Email	<input type="checkbox"/> Mail	<input type="checkbox"/> Telephone	<input type="checkbox"/> SMS	Applicant 2	<input type="checkbox"/> Email	<input type="checkbox"/> Mail	<input type="checkbox"/> Telephone	<input type="checkbox"/> SMS
Applicant 3	<input type="checkbox"/> Email	<input type="checkbox"/> Mail	<input type="checkbox"/> Telephone	<input type="checkbox"/> SMS	Applicant 4	<input type="checkbox"/> Email	<input type="checkbox"/> Mail	<input type="checkbox"/> Telephone	<input type="checkbox"/> SMS

Member Rewards

When appropriate, Principality would **also** like to contact you with information and special offers about how to sign up for their exclusive loyalty programme, Member Rewards. This may include information on third party promotions and discounts.

If you're **also** happy for Principality to contact you about Member Rewards, please tick below:

Applicant 1	<input type="checkbox"/>	Applicant 2	<input type="checkbox"/>
Applicant 3	<input type="checkbox"/>	Applicant 4	<input type="checkbox"/>

You will only receive this information by your preferred contact method(s) detailed above, providing you have ticked at least one of them. If you don't tick one of them, you will not receive this information.

You can opt out of receiving direct marketing by calling Principality on 0330 333 4435 or by using the 'unsubscribe' link in their emails.

Address and living status	Applicant 1	Applicant 2
House name		
House number		
Flat number		
Street name		
District		
Town		
Postcode		
County		
Current Residential Status	<input type="checkbox"/> Owner outright <input type="checkbox"/> Mortgaged <input type="checkbox"/> Parents <input type="checkbox"/> Living with friends <input type="checkbox"/> Renter <input type="checkbox"/> Other	<input type="checkbox"/> Owner outright <input type="checkbox"/> Mortgaged <input type="checkbox"/> Parents <input type="checkbox"/> Living with friends <input type="checkbox"/> Renter <input type="checkbox"/> Other
Time at address		
If homeowner with mortgage:		
Lender's name		
Loan / Account number		
Balance outstanding (£)		

Current Employment Details	Applicant 1	Applicant 2
Occupation	<input type="checkbox"/> Senior Manager <input type="checkbox"/> Manager <input type="checkbox"/> Middle Manager <input type="checkbox"/> Supervisory <input type="checkbox"/> Professional – Technical <input type="checkbox"/> Professional – Non-technical <input type="checkbox"/> Skilled <input type="checkbox"/> Semi-skilled <input type="checkbox"/> Clerical <input type="checkbox"/> Director <33% Holding <input type="checkbox"/> Director >33% Holding <input type="checkbox"/> Sole Trader <input type="checkbox"/> Un-skilled <input type="checkbox"/> YTS training scheme / Modern Apprenticeship <input type="checkbox"/> Other	<input type="checkbox"/> Senior Manager <input type="checkbox"/> Manager <input type="checkbox"/> Middle Manager <input type="checkbox"/> Supervisory <input type="checkbox"/> Professional – Technical <input type="checkbox"/> Professional – Non-technical <input type="checkbox"/> Skilled <input type="checkbox"/> Semi-skilled <input type="checkbox"/> Clerical <input type="checkbox"/> Director <33% Holding <input type="checkbox"/> Director >33% Holding <input type="checkbox"/> Sole Trader <input type="checkbox"/> Un-skilled <input type="checkbox"/> YTS training scheme / Modern Apprenticeship <input type="checkbox"/> Other
Employment Industry		
Job title		
Employer's name		
Building name / no		
Street name		
District		
Town		
Postcode		
County		
Phone number		
Fax number		
Payroll number		
Basic salary (£)		
Regular overtime (£)		
Regular / guaranteed shift allowance (£)		
Regular / guaranteed bonus (£)		
Regular / guaranteed commission (£)		
Car allowance (£)		
Mortgage allowance (£)		
Working tax credit (£)		
Town allowance (£)		
Second job (£)		
Gross annual pension (£)		
Other pay / income (£)		
Nature of other pay / income		
Time in current job (years and months)		

Monthly expenditure	Applicant 1	Applicant 2
Credit Card(s)		
Total amount outstanding (£)		
Total monthly payment (£)		
To be repaid prior to offer of this mortgage?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Part	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Part
Hire purchase(s)		
Total amount outstanding (£)		
Total monthly payment (£)		
To be repaid prior to offer of this mortgage?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Part	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Part
Note		
If less than 6 months do not include the monthly amount. This is to ensure the details are correct for the purpose of affordability.		
Loans / Overdrafts		
Total amount outstanding (£)		
Total monthly payment (£)		
To be repaid prior to offer of this mortgage?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Part	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Part
Note		
If less than 6 months do not include the monthly amount. This is to ensure the details are correct for the purpose of affordability.		
Student Loan		
Does the customer have a student loan?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Student loan taken out before September 2012?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Mortgage(s)		
Does the customer have a mortgage(s) other than main residence	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Maintenance(s)		
Monthly payment (£)		
Is this payment by court order?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Bank Details	Applicant 1	Applicant 2
Bank account holder	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If bank account holder:		
Account holder name		
Sort code		
Bank account number		
Time at bank (years and months)		
Bank name		
Building name / no		
Street name		
District		
Town		
Postcode		
County		

Credit History	Applicant 1	Applicant 2
Have you ever been refused credit?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes:		
Details of credit refusal		
Have you ever failed to maintain payments on a loan?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, highest number of months in arrears in the last 3 years		
Have you ever had your house repossessed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever been made bankrupt or made any arrangement with creditors or ever been subject to a debt management plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, discharge date DD/MM/YYYY		
Details of arrangements with creditors		
Have you ever had a County Court Judgement (CCJ) or default registered against you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, number of CCJs or defaults you have had in last 3 years		
Value of CCJs or defaults in the last 3 years (£)		

Loan Requirements	
Type of loan required	<input type="checkbox"/> Residential Purchase <input type="checkbox"/> Residential Remortgage <input type="checkbox"/> Buy to Let Purchase <input type="checkbox"/> Buy to Let Remortgage <input type="checkbox"/> Residential Unencumbered <input type="checkbox"/> Buy to Let Unencumbered <input type="checkbox"/> Holiday Let
Loan amount (£)	
Amount of deposit (£)	
Source of deposit	<input type="checkbox"/> Accumulated savings / investments <input type="checkbox"/> Borrowed from another lender <input type="checkbox"/> From family <input type="checkbox"/> Inheritance <input type="checkbox"/> Lottery/Pools winnings <input type="checkbox"/> Matured savings / investments <input type="checkbox"/> Pension lump sum <input type="checkbox"/> Work bonus <input type="checkbox"/> Other (please specify below)
Purchase price / estimated value (£)	
Term of loan	
Payment type	<input type="checkbox"/> Repayment <input type="checkbox"/> IO <input type="checkbox"/> Split
Split payment interest only	£
Is there a gifted deposit or other incentive on this purchase?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, who is providing the gifted deposit?	<input type="checkbox"/> Builder <input type="checkbox"/> Family member <input type="checkbox"/> Vendor
Is this a Right to Buy property ?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is this a Homebuy purchase?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Product Code	
RTB purchase price (£)	
Charge holder / local authority	
What share of the property will the customer own? (%)	
Intended Repayment Method	
Do you wish to add Product fee to loan amount?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Broker Arrangement Fee (£)	
Is Broker Arrangement Fee to be added?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you intend to borrow any part of the purchase price other than the loan from Principality?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes	
Amount (£)	
Lender	
Does / Do the applicant / applicants wish to port an existing Principality mortgage?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes please list all account numbers	

Property Details	
House name	
House number	
Flat number	
Street name	
District	
Town	
Postcode	
County	
Type of property	<input type="checkbox"/> Detached house <input type="checkbox"/> Semi-detached house <input type="checkbox"/> Terraced house <input type="checkbox"/> Flat <input type="checkbox"/> Maisonette <input type="checkbox"/> Detached bungalow <input type="checkbox"/> Semi-detached bungalow
Number of:	
Living rooms	
Kitchens	
W.C.s	
Bedrooms	
Bathrooms	
Garages	<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold <input type="checkbox"/> Unknown
Age of property (in years)	
Do you intend to apply for a local authority grant?	
Do you intend to let any part of the property?	
Will you be using the property solely for residential purposes?	
Do you intend to use the property for commercial purposes?	
Will this property be your primary residence?	
Other occupants age 17 and over: Other than the applicant(s) please state the name(s) and age(s) of all other persons aged 17 and over who will occupy the property as permanent / semi-permanent members of the household.	
Full name	
DOB (DD/MM/YYYY)	
Full name	
DOB (DD/MM/YYYY)	
Full name	
DOB (DD/MM/YYYY)	
Full name	
DOB (DD/MM/YYYY)	
Full name	
DOB (DD/MM/YYYY)	

Solicitor and Selling Agent's details	
Name of selling agent	
Selling agent telephone number	
Contact for inspection	<input type="checkbox"/> Seller <input type="checkbox"/> Selling agent <input type="checkbox"/> Builder <input type="checkbox"/> Applicants
Contact name / company name	
Building no / name	
Street name	
District	
Town	
Postcode	
County	
Contact telephone number	
Other contact phone number	
Solicitor / Conveyancer	
Solicitor details	<input type="checkbox"/> Panel search <input type="checkbox"/> To be advised <input type="checkbox"/> New panel
Company	
Town	
Postcode	
Telephone	

Valuation

Please visit <http://www.principality.co.uk/PBS/Intermediaries/Useful-Documents> for full details of the surveys and valuations offered. Current prices can be found by downloading the Fees and Charges leaflet from Principality Brokerpoint.

Which valuation would you like?	<input type="checkbox"/> Report and Valuation for mortgage purpose only <input type="checkbox"/> Homebuyers Survey and Valuation <input type="checkbox"/> Building Survey
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Insurance details

Buildings and Contents

Your applicant(s) must have Buildings Insurance acceptable to the Principality Building Society to cover the rebuilding cost of the property as a condition of the mortgage. You can do this through us or make your own arrangements.

Principality will arrange to contact the applicant(s) to ensure that adequate arrangements exist to protect the security unless you indicate otherwise.

Are you arranging Buildings and Contents insurance cover for your client?	
Buildings	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide Buildings Insurance provider details	
Contents	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide Contents Insurance provider details	

Accident Sickness and Unemployment

In the unfortunate event of your applicant(s) being unable to work through Accident, Sickness or Unemployment it is important that they consider taking out an appropriate cover to ensure that monthly commitments can be met.

Are you arranging Accident, Sickness and Unemployment cover for your client?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide the Accident, Sickness and Unemployment insurance provider for your client	

Mortgage Life Insurance

It's important that your applicant(s) are covered should the worst happen and they die or become critically ill during the mortgage term.

Are you arranging Mortgage Life Insurance for your client?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide the Mortgage Life Insurance provider details.	

Direct Debits

Would you like to receive additional information about direct debits?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please specify preferred payment date	

Credit Check Form

You will now need to give the customer the Credit Check form (available from Forms section of Brokerpoint) to read and agree before proceeding with the electronic application.

Data Input Consent Form

You will now need to give the customer the Data Input Consent form (available from the forms sections of Brokerpoint) to complete. This authorises you to input their data onto the online application facility.



Where home matters
principality.co.uk

* To help us maintain our service and security standards, telephone calls may be monitored and recorded.

Principality Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, reference number 155998.

Principality Building Society, Principality Buildings, Queen Street, Cardiff, CF10 1UA. principality.co.uk