



Decision In Principle

Introducer Details

Company Name	<input type="text"/>	Contact Name	<input type="text"/>
Address	<input type="text"/>	Contact Number	<input type="text"/>
City/ Town	<input type="text"/>	Email Address	<input type="text"/>
Postcode	<input type="text"/>	FCA Number	<input type="text"/>
Network (if applicable)	<input type="text"/>		
Are you taking responsibility for the advice given to the client? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Requirements

Advance Required	£ <input type="text"/>	Purpose of Loan	<input type="text"/>
Term	<input type="text"/> Years <input type="text"/> Months	Repayment Method	<input type="checkbox"/> C&I <input type="checkbox"/> I/O <input type="checkbox"/> P&P
Mortgage Type	<input type="checkbox"/> Purchase <input type="checkbox"/> Remo <input type="checkbox"/> 2nd Charge	First Time Buyer	<input type="checkbox"/> Yes <input type="checkbox"/> No
Loan Type	<input type="checkbox"/> Residential <input type="checkbox"/> Shared Ownership	First Time Landlord	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> BTL <input type="checkbox"/> LTB <input type="checkbox"/> Right to Buy	If Purchase: Deposit Source	<input type="text"/>

Security Property

Value	£ <input type="text"/>	Tenure	<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold
Purchase Price/ Original PP	£ <input type="text"/>	Remaining Term on Lease	<input type="text"/> Years
Property Address	<input type="text"/>	Standard Construction	<input type="checkbox"/> Yes <input type="checkbox"/> No
City/ Town	<input type="text"/>	Construction Type	<input type="text"/>
Postcode	<input type="text"/>	Near Commercial	<input type="checkbox"/> Yes <input type="checkbox"/> No
Property Description (e.g. Semi/ Detached)	<input type="text"/>	Commercial Type	<input type="text"/>
No. of Bedrooms	<input type="text"/>	If Flat: No of Stories	<input type="text"/>
		If BTL: Rental Income (per month)	<input type="text"/>
If Flat: Type of Access?	<input type="checkbox"/> Standard <input type="checkbox"/> Deck <input type="checkbox"/> Balcony	Ex Local Authority	<input type="checkbox"/> Yes <input type="checkbox"/> No
New Build	<input type="checkbox"/> Yes <input type="checkbox"/> No	In Pre-Emption	<input type="checkbox"/> Yes <input type="checkbox"/> No
		If Yes: Years Left/ Discount Received	<input type="text"/> / £ <input type="text"/>

Security Property – Existing Mortgage

Mortgage Paid Off	<input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes: Date Redeemed	<input type="text"/>
Mortgage Lender	<input type="text"/>	Time with this Lender	<input type="text"/> Years <input type="text"/> Months
Mortgage Balance	£ <input type="text"/>	Remaining Term	<input type="text"/> Years <input type="text"/> Months
Monthly Payment	£ <input type="text"/>	Repayment Type	<input type="checkbox"/> C&I <input type="checkbox"/> I/O <input type="checkbox"/> P&P
ERC Applicable If Redeemed	£ <input type="text"/>		

Personal Details

	Applicant One	Applicant Two
Guarantor	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Title	<input type="text"/>	<input type="text"/>
First Name	<input type="text"/>	<input type="text"/>
Middle Name(s)	<input type="text"/>	<input type="text"/>

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Surname	<input type="text"/>	<input type="text"/>
Previous Name	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
Nationality	<input type="text"/>	<input type="text"/>
No. of Dependents	<input type="text"/> Ages <input type="text"/>	<input type="text"/> Ages <input type="text"/>
Current Address	<input type="text"/>	<input type="text"/>
City/ Town	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Residential Status	<input type="text"/>	<input type="text"/>
Time at Address	<input type="text"/> Years <input type="text"/> Months	<input type="text"/> Years <input type="text"/> Months
Previous Address	<input type="text"/>	<input type="text"/>
City/ Town	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Previous Status	<input type="text"/>	<input type="text"/>
Time at Current Address	<input type="text"/> Years <input type="text"/> Months	<input type="text"/> Years <input type="text"/> Months

Contact Details

Preferred Contact Number(s)	<input type="text"/>	<input type="text"/>
Preferred Email Address	<input type="text"/>	<input type="text"/>

Residential Mortgage (if different to security)

Mortgage Paid Off	<input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes: Date Redeemed	<input type="text"/>
Mortgage Lender	<input type="text"/>	Time with this Lender	<input type="text"/> Years <input type="text"/> Months
Mortgage Balance	£ <input type="text"/>	Remaining Term	<input type="text"/> Years <input type="text"/> Months
Monthly Payment	£ <input type="text"/>	Repayment Type	<input type="checkbox"/> C&I <input type="checkbox"/> I/O <input type="checkbox"/> P&P
ERC Applicable if Redeemed	<input type="checkbox"/> £ <input type="text"/>		

Occupation

	Applicant One			Applicant Two		
Income Types	<input type="checkbox"/> Employed	<input type="checkbox"/> Self-Employed	<input type="checkbox"/> Retired	<input type="checkbox"/> Employed	<input type="checkbox"/> Self-Employed	<input type="checkbox"/> Retired
Time in current occupation	<input type="text"/> Years	<input type="text"/> Months		<input type="text"/> Years	<input type="text"/> Months	
Time in continuous employment	<input type="text"/> Years	<input type="text"/> Months		<input type="text"/> Years	<input type="text"/> Months	
Shareholding	<input type="text"/> %			<input type="text"/> %		

If Employed

Employment Type	<input type="text"/>	<input type="text"/>
Basic Income (per annum)	£ <input type="text"/>	£ <input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Contact Start Date	<input type="text"/> End Date <input type="text"/>	<input type="text"/> End Date <input type="text"/>

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Basic Salary (per annum) £ £

If Self-Employed

Company Type

Net Profit/ Dividends £ Latest Year £ £ Latest Year £

Net Profit / Dividends £ Previous Year £ £ Previous Year £

Net Profit/ Dividends £ Previous Year £ £ Previous Year £

Can you provide? SA302 Qualified Acc Ref Book Keeper SA302 Qualified Acc Ref Book Keeper

If Retired

Pension Type

Private Pension £ £

State Pension £ £

Additional Income

Additional Income (pa) £ £

Please Specify

Benefit Income (pa) £ £

Please Specify

Monthly Outgoings (total for all applicants)

Rent/ Shared Ownership Rent	£ <input type="text"/>	Pension/Life Insurance	£ <input type="text"/>
Buildings & Contents Insurance	£ <input type="text"/>	Council Tax	£ <input type="text"/>
Gas, Electricity, Heating Fuels	£ <input type="text"/>	Water	£ <input type="text"/>
Communication (landing/mobile)	£ <input type="text"/>	TV License/TV Rental/Broadband	£ <input type="text"/>
Maintenance/Child Support	£ <input type="text"/>	Child Related Payments (education/childcare)	£ <input type="text"/>
School meals/Children Activities	£ <input type="text"/>	Number of Cars	<input type="text"/>
Car Expenses (tax,fuel,insurance,MOT, wear & tear)	£ <input type="text"/>	Other Travel Expenses	£ <input type="text"/>
Grocery Shopping (food/drinks)	£ <input type="text"/>	Miscellaneous (alcohol, tobacco, newspaper, lottery)	£ <input type="text"/>
Clothing/Footwear	£ <input type="text"/>	Entertainment/Socialising (eating out, gym etc)	£ <input type="text"/>
Recreation (holidays/weekend trips etc)	£ <input type="text"/>		
Other	£ <input type="text"/>	Monthly Outgoings Total	£ <input type="text"/>

Credit History

Arrears	<input type="checkbox"/> Yes <input type="checkbox"/> No	IVA	<input type="checkbox"/> Yes <input type="checkbox"/> No
Housing Benefit	<input type="checkbox"/> Yes <input type="checkbox"/> No	Debt Management	<input type="checkbox"/> Yes <input type="checkbox"/> No
CCJs	<input type="checkbox"/> Yes <input type="checkbox"/> No	Repossession	<input type="checkbox"/> Yes <input type="checkbox"/> No
Defaults	<input type="checkbox"/> Yes <input type="checkbox"/> No	Payday Loan	<input type="checkbox"/> Yes <input type="checkbox"/> No
Bankruptcy	<input type="checkbox"/> Yes <input type="checkbox"/> No	Criminal Conviction	<input type="checkbox"/> Yes <input type="checkbox"/> No

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E: helpdesk@sms-uk.co.uk A: Second Floor, Boulton House, 17 - 21 Chorlton Street, Manchester, M1 3HY T: 0161 694 7800 F: 0161 694 7901

Think carefully before securing other debts against your home.

Your home may be repossessed if you do not keep up repayments on a mortgage or any other debt secured on it.

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Details

Additional Information

Advisor Declaration

By ticking the red box I can confirm I have authority to submit this form on the clients' behalf. I can also confirm I have made my clients aware and they have consented that Solent Mortgage Services can and will be making enquiries to third parties which may include credit reference agencies. I can provide evidence of this if required to do so.

Name of Advisor Submitting

Date

Signature

Date

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