

# Intermediary Solutions

## Data Capture Form

**THIS FORM IS FOR INTERMEDIARIES INTERNAL USE ONLY AND IS NOT APPROVED FOR ISSUING TO CUSTOMER(S).**

This data capture form is designed for you to capture information about your customer(s).

This form must not be sent to us. It is to be used for data capture only. We cannot accept this as a mortgage application.

All applications must be submitted using our online system which can be found via the NatWest Intermediaries website: [www.intermediary.natwest.com](http://www.intermediary.natwest.com)

**FOR INTERMEDIARY USE ONLY**

If this a Scottish mortgage, please tick here

If this is a property to be mortgaged in Northern Ireland, please tick here

### Mortgage type

Residential Purchase

Buy to Let Purchase

Right to Buy

Residential Remortgage

Buy to Let Remortgage

Help to Buy: Mortgage Guarantee Scheme

New Build

Shared Equity

Ported Case

Product applied for. Please provide exact details.



**NatWest**

## 1. About you

### Main applicant

Surname

First name(s)

Title  Mr  Mrs  Miss  Ms

If other, please state

Sex  Male  Female

Date of birth

Relationship status

Single  Living with partner  Married/Civil partnership  
 Widowed/Surviving civil partner  Divorced/Dissolved Separated

Number of dependants

0  1  2  3  4+

Mother's maiden name (we need this information for security purposes)

Nationality

UK  Other please specify

Do you have the right to reside in the UK?  Yes  No

Present address

Postcode

At present are you?

Owner  Tenant  Living with parents  Other

If other, please provide details on page 18

When did you move to this address?

If at present address for more than 3 years go to 'Your contact details' on page 6

Please complete details for all addresses in the last three years

Previous address 1

Postcode

When did you move to this address?

Were you?

Owner  Tenant  Living with parents  Other

Please provide details on page 18 if you have had more than two addresses in the last three years

### Joint applicant

Surname

First name(s)

Title  Mr  Mrs  Miss  Ms

If other, please state

Sex  Male  Female

Date of birth

Relationship status

Single  Living with partner  Married/Civil partnership  
 Widowed/Surviving civil partner  Divorced/Dissolved Separated

Number of dependants

0  1  2  3  4+

Mother's maiden name (we need this information for security purposes)

Nationality

UK  Other please specify

Do you have the right to reside in the UK?  Yes  No

Present address

Postcode

At present are you?

Owner  Tenant  Living with parents  Other

If other, please provide details on page 18

When did you move to this address?

If at present address for more than 3 years go to 'Your contact details' on page 6

Please complete details for all addresses in the last three years

Previous address 1

Postcode

When did you move to this address?

Were you?

Owner  Tenant  Living with parents  Other

## 1. About you (cont'd)

### Main applicant

#### Your contact details

Telephone number(s)

<input type="text"/>	Home
<input type="text"/>	Work
<input type="text"/>	Mobile

Preferred contact number

Home  Work  Mobile  Any

Preferred day and contact time

Mon  Tue  Wed  Thur  Fri

am/pm

### Joint applicant

#### Your contact details

Telephone number(s)

<input type="text"/>	Home
<input type="text"/>	Work
<input type="text"/>	Mobile

Preferred contact number

Home  Work  Mobile  Any

Preferred day and contact time

Mon  Tue  Wed  Thur  Fri

am/pm

## 2. About your occupation

### Main applicant

Your Occupation & Industry

Home

Name and address of your employer/your business

Company name

Postcode

Telephone number

Date you started with this employer or own business started

Do you own a share in the company?

Yes If yes, how much is the share?  %

If 20% share or greater please go to section 4 'About your business'

No Please go to section 3 'About your job'

What is your intended retirement age?

If the proposed mortgage term exceeds your intended retirement age please complete the following:

Is retirement income available?  Yes  No

How many financial dependants will you have after retirement?

### Joint applicant

Your Occupation & Industry

Home

Name and address of your employer/your business

Company name

Postcode

Telephone number

Date you started with this employer or own business started

Do you own a share in the company?

Yes If yes, how much is the share?  %

If 20% share or greater please go to section 4 'About your business'

No Please go to section 3 'About your job'

What is your intended retirement age?

If the proposed mortgage term exceeds your intended retirement age please complete the following:

Is retirement income available?  Yes  No

How many financial dependants will you have after retirement?

## 3. About your job

This section only needs to be completed by employed applicants

### Main applicant

How often are you paid?

Monthly  Fortnightly  Weekly  Other

How are you paid?

Cash  Cheque  Salary paid into bank  Other

Are you?

Permanent  Temporary  Contract  Other

This section only needs to be completed by employed applicants

### Joint applicant

How often are you paid?

Monthly  Fortnightly  Weekly  Other

How are you paid?

Cash  Cheque  Salary paid into bank  Other

Are you?

Permanent  Temporary  Contract  Other

### 3. About your job (cont'd)

#### Main applicant

If on a contract, please specify start date

Please specify end date

Have you been continuously employed by this employer since the start date?

 Yes  No If no, please provide details on page 18

If less than 6 months with employer please state name and address of previous employer

Company name
Postcode

Your previous occupation

Start date

End date

Please go to section 5 'About your finances'

#### Joint applicant

If on a contract, please specify start date

Please specify end date

Have you been continuously employed by this employer since the start date?

 Yes  No If no, please provide details on page 18

If less than 6 months with employer please state name and address of previous employer

Company name
Postcode

Your previous occupation

Start date

End date

Please go to section 5 'About your finances'

### 4. About your business

This section only needs to be completed by applicants who run their own business

#### Main applicant

Type of business

Position held

 Sole Trader  Partner  Director

If other, please state

Please provide details of your business performance over the last two years

	Latest year	Previous year
	2 0 Y Y	2 0 Y Y
Turnover	£	£
Net profit before tax	£	£
Drawings/Salary	£	£
Dividends	£	£
Net assets	£	£

Are there any non recurring items on your profit and loss account?

 Yes  No If no, please provide details on page 18

This section only needs to be completed by applicants who run their own business

#### Joint applicant

Type of business

Position held

 Sole Trader  Partner  Director

If other, please state

Please provide details of your business performance over the last two years

	Latest year	Previous year
	2 0 Y Y	2 0 Y Y
Turnover	£	£
Net profit before tax	£	£
Drawings/Salary	£	£
Dividends	£	£
Net assets	£	£

Are there any non recurring items on your profit and loss account?

 Yes  No If no, please provide details on page 18

## 4. About your business (cont'd)

### Main applicant

Has any re-valuation of assets been carried out in the last two years?

Yes  No If no, please provide details on page 18

Your accountant's details

Postcode

Telephone number

Fax number

### Joint applicant

Has any re-valuation of assets been carried out in the last two years?

Yes  No If no, please provide details on page 18

Your accountant's details

Postcode

Telephone number

Fax number

## 5. About your finances

### Main applicant

Have you ever been bankrupt, insolvent or sequestrated?

Yes  No If no, please provide details on page 18

Have you ever been in arrears, defaulted on payments, or involved in court proceedings connected with debts or financial agreements with other lenders, including CCJs or voluntary arrangements?

Yes  No If no, please provide details on page 18

What is your annual income?

Gross annual salary

£

Regular bonus or commission

£

Discretionary bonus

£

Guaranteed bonus

£

Other guaranteed income, e.g. attendance allowance

£  Source

What is your monthly income?

Net income

£  per month

+ Any other regular income

£  per month

Total regular net monthly income for both applicants £  per month

### Both applicant

What are your monthly outgoings?

Mortgage/Rent

£  per month

Loan payments to NatWest

£  per month

Total outgoings for both applicants

£  per month

### Joint applicant

Have you ever been bankrupt, insolvent or sequestrated?

Yes  No If no, please provide details on page 18

Have you ever been in arrears, defaulted on payments, or involved in court proceedings connected with debts or financial agreements with other lenders, including CCJs or voluntary arrangements?

Yes  No If no, please provide details on page 18

What is your annual income?

Gross annual salary

£

Regular bonus or commission

£

Discretionary bonus

£

Guaranteed bonus

£

Other guaranteed income, e.g. attendance allowance

£  Source

What is your monthly income?

Net income

£  per month

+ Any other regular income

£  per month

## 5. About your finances (cont'd)

If the amount you are borrowing is less than 75% of the value of the property or under £500,000 then you do not need to complete the 'Your assets' and 'Your commitments' sections below. Please go to 'Your credit card details'

### Both applicant

#### Your assets

NatWest saving

£

Investments, e.g.stocks and shares

£

Other savings

£

Total assets for both applicants £

### Both applicant

#### Your commitments

Please specify the total amount outstanding Loans from NatWest

£

Loans from other providers

£

Guarantees

£

Purpose of guarantees

Total commitments for both applicants £

### Both applicant

#### Your credit card details

Total number of cards

0  1  2  3  4+

Please indicate card type(s) held

Visa  MasterCard  Storecard  Chargecard

Total balance outstanding for main applicant £

Total balance outstanding for main applicant £

### Main applicant

Are your commitments to be repaid on completion of the mortgage?

Yes  No

If 'Yes', please give details

Are you using mortgage monies to repay this commitment?

Yes  No

Are there any loans or other commitments not yet due, which will become payable during the mortgage?

Yes  No

If 'Yes', does this affect your ability to pay this mortgage?

Yes  No

If 'Yes', please specify the monthly amount, detail and when due.

### Joint applicant

Are your commitments to be repaid on completion of the mortgage?

Yes  No

If 'Yes', please give details

Are you using mortgage monies to repay this commitment?

Yes  No

Are there any loans or other commitments not yet due, which will become payable during the mortgage?

Yes  No

If 'Yes', does this affect your ability to pay this mortgage?

Yes  No

If 'Yes', please specify the monthly amount, detail and when due.

## 5. About your finances (cont'd)

### Main applicant

Our affordability uses expenditure including household bills and leisure activities. Based on your circumstances, do you have any other commitments that are out of the ordinary, e.g. career related qualifications or leasehold/ground rent charges? (Please note this list is not exhaustive).

Yes  No

If 'Yes', please specify the monthly amount, detail and when due.

Do you have any plans for Property Related Expenses that will affect your ability to pay this mortgage?

Yes  No

If 'Yes', please specify the monthly amount, detail and when due

Are there any personal changes that will affect your ability to pay this mortgage, e.g. change to job, changes to income or expenditure, changes to profits and family circumstances?

Yes  No

If 'Yes', please specify the monthly amount, detail and when due

Is any of your income [main, retirement (if applicable), or other] being used to support the repayment of this mortgage sourced from a currency other than Stirling?

Yes  No

If 'Yes', please state the country and currency

Country

Currency

If more than one currency applies, select the main currency.

#### Your existing residential mortgage details

What is your lenders name?

What is the mortgage reference number?

Sole or joint owned?

Monthly repayment amount?

Mortgage outstanding?

Date purchased?

Purchase Price?

Property Value?

Is your property to be sold?

Yes  No

### Joint applicant

Our affordability uses expenditure including household bills and leisure activities. Based on your circumstances, do you have any other commitments that are out of the ordinary, e.g. career related qualifications or leasehold/ground rent charges? (Please note this list is not exhaustive).

Yes  No

If 'Yes', please specify the monthly amount, detail and when due.

Do you have any plans for Property Related Expenses that will affect your ability to pay this mortgage?

Yes  No

If 'Yes', please specify the monthly amount, detail and when due

Are there any personal changes that will affect your ability to pay this mortgage, e.g. change to job, changes to income or expenditure, changes to profits and family circumstances?

Yes  No

If 'Yes', please specify the monthly amount, detail and when due

Is any of your income [main, retirement (if applicable), or other] being used to support the repayment of this mortgage sourced from a currency other than Stirling?

Yes  No

If 'Yes', please state the country and currency

Country

Currency

If more than one currency applies, select the main currency.

#### Your existing residential mortgage details

What is your lenders name?

What is the mortgage reference number?

Sole or joint owned?

Monthly repayment amount?

Mortgage outstanding?

Date purchased?

Purchase Price?

Property Value?

Is your property to be sold?

Yes  No

## 6. About your new mortgage

What is your lenders name?

What is the mortgage reference number?

Sole or joint owned?

Monthly repayment amount?

Mortgage outstanding?

Data purchased?

Purchase Price?

Property Value?

Is your property to be sold?

Yes  No

**Source of Deposit – All sources and amounts to be captured**

Savings  Equity from current property

Gift (non-repayable), sale  Remo of other property

Other

**Amount**

## 7. About your property

Full address of property to be mortgaged

Postcode

What type of property is it?

Detached  Terraced  Flat or maisonette

Semi-detached  Bungalow  If a flat, please state the number of floors in a block

How many bedrooms does the property have?

1  2  3  4  Other

What is the tenure on the property?

Freehold  Ownership  Commonhold  Leasehold  If Leasehold, remaining term  years

Has your property been significantly refurbished?  Yes  No

If yes, when was your property significantly refurbished?

Does the property have a NHBC certificate?  Yes  No

Is this a council house purchase or government supported scheme, e.g. homebuy?

Yes  No  If yes, enclose a copy of the right to buy agreement or confirmation of scheme eligibility

Is this a Help to Buy: Mortgage Guarantee Scheme mortgage?

Yes  No

What is the name of the scheme?

If Yes, upon completion of the purchase will this be the only property the customer owns, in full or in part, and will it be for their main residence?

Yes  No\*

\*The answer to this question must be **Yes** in order for a Help to Buy: Mortgage Guarantee Scheme mortgage to proceed.

Is any part of the property to be let?

Yes  No

If yes, please state term and enclose a copy of the lease

years Term  £ Rental Income

Is there to be a second charge over the property to another lender?

Yes  No

If yes, please provide full details on page 18

Total number of applicants plus dependants

Please give full names of all occupiers aged 17 or over except for children aged 25 or less living with you but with no interest in the property



## 7. About your property (cont'd)

The following questions only need to be completed for Buy to Let mortgages

If Buy to Let, is the property to be let to a related person?

Yes  No

If yes, this should be progressed as a second residential purpose mortgage/ remortgage (not Buy to Let). Please note we will not lend on Houses of Multiple Occupancy.

How many Residential and Rental properties, mortgaged and unencumbered, do you currently own in total? (UK properties only)

0  1  2  3  4  5  6-10  10-15

### Main applicant

How many Buy to Let/Consent to Let properties do you have with RBS Group?

How many Buy to Let/Consent to Let properties do you have with any other lender?

What is your **total** amount of monthly mortgage payments?

£

What is the **total** gross monthly rental income received?

£

What is the **total** amount of mortgage balances outstanding?

£

What is the anticipated Monthly Rental Income (Gross) from this property?

£

What is the estimated value of the portfolio?

Do you understand that you are required to enter into a formal letting agreement?

Yes

**Please note, a formal letting agreement is required. This must either be an assured shorthold (in England and Wales) or short assured (in Scotland) tenancy.**

**The following questions only need to be completed where you own 4 or more Rental properties (Buy to Let, Consent to Let or Unencumbered) including this property being mortgaged:**

### Main applicant

How many years have you been a landlord?

Do you have plans to expand your portfolio in the next 5 years?

Yes  No

If yes, Please give details of your plans

Do you have plans to sell any properties in the next 5 years?

Yes  No

If yes, Please give details of your plans

### Joint applicant

How many Buy to Let/Consent to Let properties do you have with RBS Group?

How many Buy to Let/Consent to Let properties do you have with any other lender?

What is your **total** amount of monthly mortgage payments?

£

What is the **total** gross monthly rental income received?

£

What is the **total** amount of mortgage balances outstanding?

£

What is the anticipated Monthly Rental Income (Gross) from this property?

£

What is the estimated value of the portfolio?

### Joint applicant

How many years have you been a landlord?

Do you have plans to expand your portfolio in the next 5 years?

Yes  No

If yes, Please give details of your plans

Do you have plans to sell any properties in the next 5 years?

Yes  No

If yes, Please give details of your plans

## Property 1

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

### Property Details:

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## Property 2

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

### Property 3

### Property 4

Owner/s:  Joint  Applicant 1  Applicant 2

Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

£

Lender name:

Reference No:

Monthly Repayment Amount: £

£

Mortgage Balance Outstanding: £

£

Repayment type:  Repayment  Part and Part  
 Interest Only

Repayment  Part and Part  
 Interest Only

Mortgage Term remaining: years months

years months

Date Purchased: DDMMYYYY

DDMMYYYY

Purchase Price: £

£

Estimated Property Value: £

£

#### Property Details:

Flat/House Name/Number:

Post Code: DDMMYYYY

DDMMYYYY

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Yes  No

Are you redeeming this mortgage?  Yes  No

Yes  No

If No, what is happening to your existing property?

## Property 5

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

### Property Details:

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## Property 6

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## Property 7

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

### Property Details:

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## Property 8

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## Property 9

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

### Property Details:

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## Property 10

Owner/s:  Joint  Applicant 1  Applicant 2

Property Usage:  Residential  Buy to Let

Property Ownership:  Unencumbered  Mortgaged (held with the RBS Group)  
 Mortgaged (held Elsewhere)

Monthly Rental Income (Gross) £

Lender name:

Reference No:

Monthly Repayment Amount: £

Mortgage Balance Outstanding: £

Repayment type:  Repayment  Part and Part  
 Interest Only

Mortgage Term remaining:  years  months

Date Purchased:

Purchase Price: £

Estimated Property Value: £

Flat/House Name/Number:

Post Code:

Address line 1

Address line 2

Address line 3

City

County

Property Type:  House  Bungalow  
 Flat (Purpose built)  Flat (Converted)

House or Bungalow Type:  Detached  Semi-Detached  
 Mid Terraced  End Terraced

No. of bedrooms:

Do you use a letting Agent?  Yes  No

Are you redeeming this mortgage?  Yes  No

If No, what is happening to your existing property?

## 8. Your property valuation

Do you wish us to arrange a valuation?

Yes  No

**Please note we will normally instruct a surveyor to prepare a valuation report. This report is for our sole use for valuation purposes. You should not rely on this valuation report for your purposes and we recommend you arrange a comprehensive survey for your own protection.**

Do you wish to arrange a more comprehensive survey?

Yes  No

Do you require a Homebuyer's report?

Yes  No

Please give details of who the surveyor should contact to access the property

Contact name

Tel. number

Address

Postcode

Selling agent's details (if different) or valuers details (for Scottish mortgages)

Contact name

Tel. number

Company name

Address

Postcode

Solicitor/Licensed conveyancer details (please provide contact name. Only needs be completed if using own solicitor)

Contact name

Tel. number

Company name

Address

Postcode

## 9. About your new house purchase

This section only needs to be completed for the purchase of a property. Please go to section 10 to provide remortgage or transfer of title only details.

Property value

£

Term

years

months

Purchase price

£

Repayment Type

Deposit amount

£

Total No of Applicants plus dependents

Total required

£

Source of deposit

Are the following fees to be added to the loan on completion?

Product Fee

£

Yes

No

Valuation/Survey fee

£

Legal fees

£

Total fees

£

If any of the above fees are added onto your loan you should note the interest on these fees will be payable from the date they are added to your loan. To avoid paying interest on these fees you have the option of paying these in full when they arise.

Your total borrowing

£

The following questions only need to be completed for Buy to Let mortgages

What is the amount of rental income?

£

per year

Is there sufficient surplus income to fund any increase in costs?  
e.g. increase in interest rates

Yes

No

If no, what are your proposals for funding any shortfall?

Reduced drawings

Sell assets

Inject new funds

Other If no, please provide details on page 18

A separate Buy to Let supplementary sheet (NWB 2003) should be completed for each additional property which is to be purchased for Buy to Let purposes.



## 10. About your remortgage or transfer of title

This section needs to be completed for the remortgage of an existing property or transfer of title only.

Estimated value of your property

Present loan

Amount of additional borrowing

The amount you want to borrow including additional borrowing

Purpose of borrowing

Product Fee

Is the following to be added to the loan on completion?

Yes

No

**If this fee is added onto your loan you should note the interest on it will be payable from the date it is added to your loan. To avoid paying interest on this fee you have the option of paying in full when it arises.**

Your total borrowing

**The following questions only need to be completed for Buy to Let mortgages**

What is the amount of rental income?

 per year

Is there sufficient surplus income to fund any increase in costs? e.g. increase in interest rates

Yes

No

If no, what are your proposals for funding any shortfall?

Reduced drawings

Sell assets

Inject new funds

Other If no, please provide details on page 18

**Will the property be let out for investment purposes? By 'investment' we mean that you are looking to benefit from rental income or future house price growth.**

Yes

No

*Answering 'No' to this question indicates Consumer Buy to Let borrowing status. We do not currently offer this type of lending and will be unable to progress.*

## 11. Your repayment method

Please detail your chosen repayment strategy and product(s) that you have chosen for your mortgage

### Product one

Repayment type

Capital repayment  Interest Only

Repayment Strategy for Interest Only

This Mortgaged Property, Main Residence

This Mortgaged Property, Not Main Residence

Other Mortgaged Property

Unencumbered Property, Main Residence

Unencumbered Property, Not Main Residence

Stocks and Shares (Traded on an authorised exchange)

Unit Trusts (EU Authorised)

OEICs (EU Authorised)

ICVC – Investment Company with variable Capital (EU Authorised)

Pension (UK Authorised)

Savings

Other Assets (Existing NatWest Mortgage customers only)

Endowment

If other, please provide details on page 18

Current value of repayment strategy if applicable

£

Provider of repayment strategy if applicable

Expected maturity/Realisation date

DDMMYYYY

Product name

Interest rate

Expiry date

DDMMYYYY

Amount

£

Term

years months

### Product two

Repayment type

Capital repayment  Interest Only

Repayment Strategy for Interest Only

This Mortgaged Property, Main Residence

This Mortgaged Property, Not Main Residence

Other Mortgaged Property

Unencumbered Property, Main Residence

Unencumbered Property, Not Main Residence

Stocks and Shares (Traded on an authorised exchange)

Unit Trusts (EU Authorised)

OEICs (EU Authorised)

ICVC – Investment Company with variable Capital (EU Authorised)

Pension (UK Authorised)

Savings

Other Assets (Existing NatWest Mortgage customers only)

Endowment

If other, please provide details on page 18

Current value of repayment strategy if applicable

£

Provider of repayment strategy if applicable

Expected maturity/Realisation date

DDMMYYYY

Product name

Interest rate

Expiry date

DDMMYYYY

Amount

£

Term

years months

### Product three

Repayment type

Capital repayment  Interest Only

Repayment Strategy for Interest Only

This Mortgaged Property, Main Residence

This Mortgaged Property, Not Main Residence

Other Mortgaged Property

Unencumbered Property, Main Residence

Unencumbered Property, Not Main Residence

Stocks and Shares (Traded on an authorised exchange)

Unit Trusts (EU Authorised)

OEICs (EU Authorised)

ICVC – Investment Company with variable Capital (EU Authorised)

Pension (UK Authorised)

Savings

Other Assets (Existing NatWest Mortgage customers only)

Endowment

If other, please provide details on page 18

Current value of repayment strategy if applicable

£

Provider of repayment strategy if applicable

Expected maturity/Realisation date

DDMMYYYY

Product name

Interest rate

Expiry date

DDMMYYYY

Amount

£

Term

years months

## 12. Your fees payment

Which fees are you paying?

Valuation only     Homebuyer's report     Arrangement/completion fee

### Fees summary (to be completed by all applicants)

Product Fee

£

Valuation/survey fee

£

**Valuation fee includes an administration fee of £75 including VAT.**

Total fees

£

Preferred Direct Debit date

Due mortgage related fees should be paid by the customer once you, the broker, have received the mortgage application reference number.

Please review our current packaging requirements on the NatWest Intermediaries website - [www.intermediary.natwest.com](http://www.intermediary.natwest.com)