

Mortgage Illustration Request Form

THIS IS AN ELECTRONICALLY EDITABLE FORM. PLEASE TYPE INSIDE THE FIELD TO COMPLETE.

Please complete all the fields on this form then click 'save request and send' at the bottom of the form to save the populated fields and email it to illustrations@natwest.com

All fields must be completed to avoid the request being rejected.

Intermediary Information

Business Name

Intermediary Name

Address

Postcode

Telephone

Email (where response is to be sent)

FCA No.

Client Information

Please ensure you have obtained your client's consent to allow you access to their existing mortgage information held by the bank. We will populate the Mortgage Illustration with the balance outstanding. Note that the values in this Mortgage Illustration may alter between now and completion.

Main applicant

Mr Mrs Miss Ms

Client's Full Name(s)

Sex

Male Female Date of Birth

Current Full Address

Postcode

Existing NatWest Mortgage Account No.

Other Information (i.e.2nd Account number if client has 2 mortgages to port.)

Joint applicant

Mr Mrs Miss Ms

Client's Full Name(s)

Sex

Male Female Date of Birth

Current Full Address

Postcode

Existing NatWest Mortgage Account No.

Other Information (i.e.2nd Account number if client has 2 mortgages to port.)



Client's Loan Requirements All this data is required in order to produce a Mortgage illustration from our system

Advance Type

Purchase Remortgage Buy to Let
 Withdrawn Product

Purchase Price/Valuation (approximate if not known)

£

Loan to Value

Repayment Strategy

Interest Only

£

Capital & Interest

£

Total

£

Does your client wish to add the following fees to the advance?

Product Fee

£

Tick this box if the property to be mortgaged is in Scotland or Northern Ireland

Scotland

Mortgage Required (including ported element if applicable)

£

New Term

Years Months

Keep Existing Term

New Product (include rate, discount and end date. Certain products may carry restrictions, so please check that all qualifying criteria are met)

Type product code here

Type the product description here

Mortgage Illustration Information (Please complete all fields)

Name of Principal (if applicable)

(under whose FCA number you will submit the full application)

Business Development Manager (if known)

Name of Mortgage Club/Network

(if different from above)

Which Level of Service are you providing your client with?

Residential applications

Advised

Buy to Let

Unregulated

Are you charging a fee for arranging this mortgage?

Yes No

£

Any further information:

Next Steps

Please ensure you have completed all fields as this is the minimum amount of information we will require to produce a compliant ported product Mortgage Illustration from our system.

Email the form to us at illustrations@natwest.com.

NWIS 8010 06/20

SAVE REQUEST AND SEND

ONLY FOR USE BY MORTGAGE INTERMEDIARIES

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by the Prudential Regulation Authority and
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NatWest