



# Mortgage Application Xpress (MAX)

Buy to Let (BTL)

Data Capture Form (DCF)



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## Buy to Let (BTL)

### Data Capture Form (DCF)

(If you wish to capture data for Applicants 3 and 4 please use a further form)

Customer name(s):

Date of Interview:

This form is for intermediaries' internal use only and is not approved for issuing to customer(s)

1.
2.
3.
4.

### When to Use the Data Capture Form

This Data Capture Form is designed to capture the required information for a Barclays **Buy to Let (BTL)** case when you are unable to access our On-line System or external Sourcing Systems. This Form is NOT intended to be submitted to Mortgage Loans Services (MLS). It **will not** be actioned and **will be returned** to you for electronic submission.

### How to Use the Data Capture Form

1. Ensure the Data Capture Form is completed in full and an accurate record of the customer(s)' circumstances is captured. (If data is missing, contact the customer prior to submitting the application on MAX/Mortgage Brain – **do not submit an incomplete application**).
2. Ensure you also print and have available at the meeting a standalone BTL Mortgage Declaration with Direct Debit Mandates to capture customer(s)' signature(s).
3. Transfer ALL the information from the Data Capture Form onto MAX/Mortgage Brain and complete the standalone BTL submission Cover Sheet, Mortgage Declaration and Direct Debit Mandate with the appropriate MAX/Mortgage Brain Case Reference Number, Customer(s)' Name and Date.

4. Print from MAX/Mortgage Brain an Application Form capturing the MAX/Mortgage Brain reference and forward to the customer for checking details transferred are correct and for the customer's retention.
5. **Once the customer has checked the Printed MAX/Mortgage Brain Application Form and confirmed that all details have been transferred correctly, please destroy the Data Capture Form (Confidential waste).**
6. Case can now be submitted on MAX/Mortgage Brain.
7. Forward any essential signed documentation along with the signed standalone BTL submission Cover Sheet, Mortgage Declaration and Direct Debit Mandate to MLS within 5 days of the meeting taking place for their retention.

**Please note the customer must have signed and returned all essential documentation before any application can be submitted to MLS reminder.**

**This Form must NOT be sent to Mortgage Loan Services (MLS) as it is not intended to replace the MAX/Mortgage Brain Application process.**

**This form is for intermediaries' internal use only and is not approved for issuing to customer(s).**

## Tell us about your Loan Requirements

Foreign Currency Loan

Yes  No

Are all of the income or assets that will be used to service the loan denominated in sterling?

### Tell me what this loan is for.

Type of Lending

Buy to Let

How can we help you?

Remortgage  Purchase  First Purchase  Further Advance

Please indicate how you would like to apply for this loan (*Private name(s)/Existing SPV/LLP*).

If this is one of a number of applications you are making at this time please indicate how many.

Questions 1-4 below only need to be answered for applications in Private name(s)

- |  |  |
|--|--|
| 1. Do any of the borrowers currently own any other properties that is let out on the basis of a rental agreement? <input type="checkbox"/> Yes <input type="checkbox"/> No | 3. Do any of the borrowers, their partners or anyone related to them, currently live in the property to be mortgaged? <input type="checkbox"/> Yes <input type="checkbox"/> No   |
| 2. Are all of the properties occupied by the borrowers, their partners or anyone related to them? <input type="checkbox"/> Yes <input type="checkbox"/> No                 | 4. Have any of the borrowers, their partners or anyone related to them, lived in the property since they have owned it? <input type="checkbox"/> Yes <input type="checkbox"/> No |

Will the property be occupied by the borrowers, their partners or anyone related to them.  Yes  No

Remortgage Purpose?

## Lending Criteria

Does the main applicant meet the minimum income requirements?

Yes  No

Does the main applicant meet the minimum age requirements?

Yes  No

Main Applicant's Age?

## Company Details

*Complete this section only where applying in name of SPV/LLP. Only available for existing SPV/LLP customers. Otherwise please go to Personal details section*

If the Applicant(s) opt(s) to borrow via an existing Barclays Special Purpose Vehicle (UK) Limited Company (SPV) and/or Limited Liability Partnership (LLP), please remember that it must be incorporated in the UK (England, Wales, Scotland or Northern Ireland) for the sole activity is to purchase and/or remortgage of residential properties for letting. It may have up to four directors/shareholders/members, all of whom must be private individuals and included on the Data Capture Form using a further form for Customers 3 and 4. We will require as additional security a Floating Charge (Debenture) from the SPV Limited Company together with a full Personal Guarantee from each director/shareholder/member. Please note we will require confirmation from the Applicant(s)' solicitor that they have received Independent Legal Advice (ILA) before signing the Personal Guarantee. The Company/LLP cannot let the property to a member or an associated company/LLP (by virtue of common directors/shareholders/members) or to any/all of the directors/shareholders, their families or any person related to them.

For an existing Barclays SPV Limited Company to be acceptable, it must be registered at Companies House with an appropriate Standard Industry Classification (SIC) Code.

The following are acceptable codes:

- **7012 Buying & Selling own real estate**
- **7020 Letting on own property**
- **7032 Manage real estate**

### Company's Registered Address

Address type – i.e. UK	<input type="text"/>	Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>
	<input type="text"/>	Telephone Number	<input type="text"/>
	<input type="text"/>	Fax Number	<input type="text"/>
Flat Number	<input type="text"/>	Company Name	<input type="text"/>
House or Building Name	<input type="text"/>	Company Registration Number	<input type="text"/>
House or Building Number	<input type="text"/>	Date of Incorporation	<input type="text"/>
Street Name	<input type="text"/>	No. of Shareholders	<input type="text"/>
District	<input type="text"/>	No. of Directors	<input type="text"/>
Town	<input type="text"/>	If Applying as LLP – No. of Members	<input type="text"/>
County	<input type="text"/>		
Postcode	<input type="text"/>		

Has the <company>/<LLP> already provided a Floating Charge (Debenture) to another lender or bank?  Yes  No

If yes, Lender/Bank	<input type="text"/>
Account Number	<input type="text"/>
Purpose	<input type="text"/>
Amount Outstanding	£ <input type="text"/>

Have any changes been made to the SPV Limited Company or LLP since completion of the original mortgage?  Yes  No

### Correspondence Address

Address type – i.e. UK	<input type="text"/>	District	<input type="text"/>
	<input type="text"/>	Town	<input type="text"/>
	<input type="text"/>	County	<input type="text"/>
Flat Number	<input type="text"/>	Postcode	<input type="text"/>
House or Building Name	<input type="text"/>	Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>
House or Building Number	<input type="text"/>	Telephone Number	<input type="text"/>
Street Name	<input type="text"/>		

## Customer Details

### Personal Details

	Customer 1	Customer 2
Title	<input type="text"/>	<input type="text"/>
First Name	<input type="text"/>	<input type="text"/>
Middle name(s)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Have you ever been known by another name?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If so, please state previous Surname	<input type="text"/>	<input type="text"/>
Date name changed	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
Age	<input type="text"/>	<input type="text"/>
Gender	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
Are you a UK citizen or do you hold a European Community passport?	<input type="text"/>	<input type="text"/>
What is your Nationality?	<input type="text"/>	<input type="text"/>
Country of permanent residence	<input type="text"/>	<input type="text"/>
Are you an expatriate?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
What is your existing relationship with us?	<input type="text"/>	<input type="text"/>
Are you an existing customer?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Existing Barclays current account	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Existing Barclays Buy to Let customer	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Address Details**

**Customer 1**

**Customer 2**

What is your Current Address?	<input type="text"/>	<input type="text"/>
Address Type – i.e. UK	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Flat Number	<input type="text"/>	<input type="text"/>
House or Building Name	<input type="text"/>	<input type="text"/>
House or Building Number	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
District	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Sub Country (i.e. England/Scotland/Wales)	<input type="text"/>	<input type="text"/>
What is your residential status? Owner/Tenant	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
Time at Address	<input type="text"/>	<input type="text"/>
What is the value of your residential property?	<input type="text"/>	<input type="text"/>
Are you going to let out your current residential property and buy another for owner occupation?	<input type="text"/>	<input type="text"/>

*Previous Address (if you have lived at your current address for less than 3 years)*

Address Type – i.e. UK	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Flat Number	<input type="text"/>	<input type="text"/>
House or Building Name	<input type="text"/>	<input type="text"/>
House or Building Number	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
District	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>

**Customer 1**

**Customer 2**

Postcode	<input type="text"/>	<input type="text"/>
Sub Country (i.e. England/Scotland/Wales)	<input type="text"/>	<input type="text"/>
What is your residential status? (Owner/Tenant)	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>
Time at Address	<input type="text"/>	<input type="text"/>
What is the value of your residential property?	<input type="text"/>	<input type="text"/>

### Previous Lender/Landlord

If you have had your current mortgage/tenancy for less than 12 months, please give details of your previous lender/landlord.

Lender/Landlord	<input type="text"/>	<input type="text"/>
Length: Years	<input type="text"/>	<input type="text"/>
Length: Months	<input type="text"/>	<input type="text"/>

### Let to Buy Details (complete if applicant is letting out the existing residential and buying a new for owner occupation)

Lender	<input type="text"/>	Do you know your new address?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lender Address Type i.e. UK	<input type="text"/>	If yes, please complete below.	
<input type="text"/>	<input type="text"/>	Address Type i.e. UK	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Flat Number	<input type="text"/>	Flat Number	<input type="text"/>
House or Building Name	<input type="text"/>	House or Building Name	<input type="text"/>
House or Building Number	<input type="text"/>	House or Building Number	<input type="text"/>
Street	<input type="text"/>	Street	<input type="text"/>
District	<input type="text"/>	District	<input type="text"/>
Town	<input type="text"/>	Town	<input type="text"/>
County	<input type="text"/>	County	<input type="text"/>
Postcode	<input type="text"/>	Postcode	<input type="text"/>
Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>	Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>
New Mortgage Amount	<input type="text"/>		

**What are your contact details?**

	<b>Customer 1</b>	<b>Customer 2</b>
Do you want us to write to you at a PO Box address?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, please give details.	<input type="text"/>	<input type="text"/>
Do you want us to write to you at a different address?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If Yes, please give details.	<input type="text"/>	<input type="text"/>
What is your preferred method of contact?	<input type="text"/>	<input type="text"/>
Preferred contact time	<input type="text"/>	<input type="text"/>
Home phone number	<input type="text"/>	<input type="text"/>
Work phone number	<input type="text"/>	<input type="text"/>
Mobile phone number	<input type="text"/>	<input type="text"/>
Fax number	<input type="text"/>	<input type="text"/>
E-mail address	<input type="text"/>	<input type="text"/>

**Employment and Income**

What is your main employment status?	<input type="text"/>	<input type="text"/>
Is this your main employment?	<input type="text"/>	<input type="text"/>
What is your employer's name?	<input type="text"/>	<input type="text"/>
What is the basis of your employment?	<input type="text"/>	<input type="text"/>
What is your occupation?	<input type="text"/>	<input type="text"/>
Length of time with present employer	<input type="text"/>	<input type="text"/>
Employer's Contact Name	<input type="text"/>	<input type="text"/>
What is your current basic income (per period)?	<input type="text"/>	<input type="text"/>
Regular overtime (per period)	<input type="text"/>	<input type="text"/>
Guarantee bonus (per period)	<input type="text"/>	<input type="text"/>
Commission (per period)	<input type="text"/>	<input type="text"/>
Allowances (per period)	<input type="text"/>	<input type="text"/>

**Employer's Address**

Address Type i.e. UK	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Flat Number	<input type="text"/>	<input type="text"/>
House or Building Name	<input type="text"/>	<input type="text"/>
House or Building Number	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
District	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Sub Country (i.e. England/Scotland/Wales)	<input type="text"/>	<input type="text"/>



## Self Employed

	Customer 1	Customer 2
What is the name of your business?	<input type="text"/>	<input type="text"/>
When was the business established? (Month, year)	<input type="text"/>	<input type="text"/>
Are you a partner, sole trader or limited company director?	<input type="text"/>	<input type="text"/>
What percentage of the shares in this business do you own?	<input type="text"/>	<input type="text"/>
What is your share of net profit – latest period (ending on)?	<input type="text"/>	<input type="text"/>
Share or net profit – previous period (ending on)?	<input type="text"/>	<input type="text"/>
Owned or part owned?	<input type="text"/>	<input type="text"/>
<b>Business Address:</b>		
Address Type – i.e. UK	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
House or Building Name	<input type="text"/>	<input type="text"/>
House or Building Number	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
District	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Sub Country (i.e. England/Scotland/Wales)	<input type="text"/>	<input type="text"/>
At what age are you planning to retire?	<input type="text"/>	<input type="text"/>
You must ensure that the planned retirement age for all applicants is documented accurately.		
<b>Source of Retirement Income</b>		
Income from another property	<input type="checkbox"/>	<input type="checkbox"/>
Personal Pension	<input type="checkbox"/>	<input type="checkbox"/>
Part-time Employment	<input type="checkbox"/>	<input type="checkbox"/>
State Pension	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>
Please give details (applicable if 'Other' selected).	<input type="text"/>	<input type="text"/>
Amount of Net Income per month	£ <input type="text"/>	£ <input type="text"/>

**Accountant's Details**

	<b>Customer 1</b>	<b>Customer 2</b>
Accountant's Name	<input type="text"/>	<input type="text"/>
Qualification	<input type="text"/>	<input type="text"/>
Address Type – i.e. UK	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
House or Building Name	<input type="text"/>	<input type="text"/>
House or Building Number	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
District	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Sub Country (i.e. England/Scotland/Wales)	<input type="text"/>	<input type="text"/>
Telephone Number	<input type="text"/>	<input type="text"/>
Fax Number	<input type="text"/>	<input type="text"/>

If you have been in your present employment for less than 6 months, please give full details of previous employment for the last 18 months.

Occupation	<input type="text"/>	<input type="text"/>
Employer's name	<input type="text"/>	<input type="text"/>
Employer's Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Address Type – i.e. UK	<input type="text"/>	<input type="text"/>
House or Building Name	<input type="text"/>	<input type="text"/>
House or Building Number	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
District	<input type="text"/>	<input type="text"/>
Town	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Sub Country (i.e. England/Scotland/Wales)	<input type="text"/>	<input type="text"/>
Employer's Telephone No.	<input type="text"/>	<input type="text"/>
When did you start this employment? (MM/YYYY)	<input type="text"/>	<input type="text"/>
When did you leave? (MM/YYYY)	<input type="text"/>	<input type="text"/>

## Do you have other income?

	Customer 1	Customer 2
Source of Other Income	<input type="text"/>	<input type="text"/>
Description of Other Income	<input type="text"/>	<input type="text"/>
Amount of Other Income	£ <input type="text"/>	£ <input type="text"/>

## Affordability

In assessing the affordability of this mortgage, we make assumptions about the possibility of a shortfall in rental income (for example, arising as a result of void periods, rental arrears or lower than expected rental income), increases in running costs, and higher mortgage payments due to increased interest rates. Our assessment is also based on the use of personal income to cover any shortfall where the rental cover calculation at our current affordability rate is not met. You should therefore carefully consider the potential risk of any or all of these events occurring and your ability to continue to manage your mortgage payments.

## Your Affordability

Number of applicants party to this application	<input type="text"/>
Number of people financially dependent on the applicants	<input type="text"/>

## Tell me about your monthly expenditure

Our assessment on whether you can afford this mortgage is based on:

- Current interest rates, which may rise in the future
- Your current circumstances, which might change in the future
- The use of personal income to cover any shortfall where the rental cover calculation at our current affordability rate is not met

Confirm that your customer has understood this

How much do you pay per month for your residential mortgage:

Service charges/Ground Rent	£ <input type="text"/>
-----------------------------	------------------------

Must be completed for all leasehold properties and any other properties where applicable.

Council Tax	£ <input type="text"/>
-------------	------------------------

Council tax must be calculated over 12 months.

Child Care/School fees	£ <input type="text"/>
------------------------	------------------------

Maintenance	£ <input type="text"/>
-------------	------------------------

Other regular commitments (not living expenses, clothes, food or utilities)	£ <input type="text"/>
---	------------------------

Your Budget	£ <input type="text"/>
-------------	------------------------

Net Monthly Disposable (excluding mortgage package costs)

Calculated based on estimated mortgage payment costs and commitments details provided.

What amount would you like to budget monthly for the Mortgage and Mortgage Protection related expenses?

What amount is included for protection?

Does this amount include flexibility?

 Yes  No

### Existing Residential Mortgage(s)

How much is your existing mortgage? (including any associated linked accounts)

Please enter current Lender's address and when house purchased in the space provided below

Customer 1st	Customer 2nd	Mortgage Acc No.	Mortgage Lender	Outstanding Balance	Current Term	ERC Payable	End Date	Repayment or Interest Only
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>

Is this mortgage to be repaid?  Yes  No If yes, please provide details

Are there any charges on the property?  Yes  No If yes, please provide details

### Any Other Commitments

Please include store cards, loans, credit cards, overdraft repayments, rental payments, HP agreements, maintenance, childcare, costs of 2nd property and leasehold charges. Please also enter any future loans or credit commitments that are not currently being repaid which will become due during the term of the mortgage, e.g. any shared equity loans or deferred credit.

Customer 1st	Customer 2nd	Type of Commitment	Outstanding Balance	Monthly Payment	Will this be cleared on completion
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>

Where a commitment is to be cleared on completion please give details of source of funds (capital raising on the buy to let mortgage to do this is not allowed), along with any other information, please note below.

## Any Other Mortgages

Please include details of any other Buy to Let or Permission to Let Properties.

Customer 1st	Customer 2nd	Mortgage Acc No.	Mortgage Lender	Outstanding Balance	Current Term	ERC Payable	End Date	Monthly Rent Received
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="text"/>

If you have any other information, please note below.

Will the mortgage be used to repay any of these mortgages?  Yes  No

If yes, how much? £

## Tell me about your borrowing requirements

### Potential Changes

#### A mortgage that is right for you Anticipated circumstances

Do you anticipate any significant changes in income?

Yes  No

Reasons

#### Change type

Increase  Decrease

How much is the change (and how often)?

annually  half-yearly  quarterly

monthly  fortnightly  weekly

When will this happen?

Reasons

Do you anticipate any significant changes in expenditure, including any increase in your residential mortgage?

Yes  No

Reasons

#### Change type

Increase  Decrease

How much is the change (and how often)?

annually  half-yearly  quarterly

monthly  fortnightly  weekly

When will this happen?

Reasons

Are you likely to receive a capital lump sum within the mortgage term?

Yes  No

How much? £

When will this happen?

Will you use it to repay any of this mortgage?

Yes  No

How much? £

Reasons

Do you expect to make regular overpayments?

Yes  No

How much and how often?

annually  half-yearly

quarterly  monthly

Reasons

How long do you intend to keep the property?

What would the impact of a significant increase in mortgage rates be to you?

#### Purchase Details

What is the estimated value of the proposed property?

#### Your chosen mortgage product

Product Type

Sanction Reference

How much deposit equity are you providing?

Source of deposit

If remortgage: summary of requirements

Remortgage Amount

Any additional borrowing required?

Purpose of additional borrowing

Fee to be added to loan

Future borrowing need

#### Loan Details

Total Loan Required £

Reason for Repayment Type

Over how many years/months do you want to repay the loan?

Do you want to consider a split term?  Yes  No

If Yes, please provide details

#### Please note that it is your responsibility to ensure that the product applied for is still available

Initial Interest Rate

Mortgage amount £

Repayment method

Product Description

Term (years and months)

**Please note you should be advised to have a suitable replacement vehicle in place to repay the interest only element. In addition you are strongly recommended to have life cover/term assurance in place to cover the full amount of all sums which you may borrow from us.**

**Repaying your Mortgage**

Which repayment type would you like?  Capital and Interest  Interest Only  Part and Part

Amount on capital and interest basis £  Amount on interest only basis £

If Interest only, how will you pay off the capital?

Projected	End Date	Policy Type	Premium
£ <input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
£ <input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
£ <input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
£ <input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
£ <input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>

How do you intend to repay the new mortgage? If you choose an interest only mortgage, what repayment vehicle do you intend to use? (include Plausibility Calculation in box below)

Where **Interest Only**, make the customer aware of the following:

- **They must have a suitable repayment plan in place to pay off their mortgage balance at the end of the agreed term**
- **Their responsibility to ensure that the repayment plan is on target to repay the mortgage at maturity**
- **You have not provided any advice in respect of the repayment plan**
- **Customer acknowledges that they may have to sell the mortgaged property upon maturity in order to repay the mortgage**
- **Customer will be required to sign a declaration to confirm the above**

If you have any other information, please note below.

Would you like to add the product fee to the loan?  Yes  No

**Credit History**

Have you ever had arrears of greater than one month on any mortgage or loan?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever been bankrupt?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever had a judgement for debt, or any default recorded against you or a company in which you hold/held at least 15%?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever entered into a voluntary arrangement with creditors?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever been refused a mortgage or any other bad credit?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you ever been convicted of (or have prosecutions pending relating to) acts of dishonesty, such as theft or fraud?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
You are not required to include convictions regarded as 'spent' by virtue of the Rehabilitation of Offenders Act 1974.		
Are you currently applying for any other mortgage(s), loan(s) or credit? If yes, please capture details.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you a guarantor for any other loans? If yes, please capture details.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Payment Details – Your Bank/Building Society Account Details**

Bank/Building Society name	<input type="text"/>	Address type – i.e. UK	<input type="text"/>
Bank Sort Code	<input type="text"/>		<input type="text"/>
Account Number	<input type="text"/>		<input type="text"/>
Names account held in	<input type="text"/>	Postcode	<input type="text"/>
Is this the account on which you want the mortgage DD to be set up?	<input type="text"/>	Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>
Bank Address (if applicable)	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		



## Property Details

*Studio flat, bedsits and properties which are classified as a House in Multiple Occupation subject to licensing are not acceptable.*

Type of Property	<input type="text"/>
Year built	<input type="text"/>
Tenure	<input type="text"/>
Type of construction: walls	<input type="text"/>
Type of construction: roof	<input type="text"/>
Was the property ever owned by a local authority or housing association?	<input type="text"/>

Additional details	<input type="text"/>
Is the property currently rented out?	<input type="text"/>
Current/Proposed letting method	<input type="text"/>
What is your actual or anticipated monthly rental income?	<input type="text"/>
Number of Tenants	<input type="text"/>
Is the property arranged as more than one unit?	<input type="text"/>
Number of Storeys	<input type="text"/>

## Details of the Property to be mortgaged

### Property Address

Address Type – i.e. UK	<input type="text"/>
Is this property a new build currently under construction for which a Postcode has not yet been allocated?	<input type="text"/>
Flat Number	<input type="text"/>
House or Building Name	<input type="text"/>
House or Building Number	<input type="text"/>

Street	<input type="text"/>
District	<input type="text"/>
Town	<input type="text"/>
County	<input type="text"/>
Postcode	<input type="text"/>
Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>

## Leasehold properties only

Unexpired term of lease (years)	<input type="text"/>
Ground rent	<input type="text"/>
Service/Maintenance Charge	<input type="text"/>
Payment Frequency	<input type="text"/>

What storey is this property on?	<input type="text"/>
Is the property purpose built?	<input type="text"/>
Is the property converted?	<input type="text"/>

### Maisonettes and flats only

Is the property situated above commercial premises?	<input type="text"/>
Number of flats in the block	<input type="text"/>
How many storeys are there in the block?	<input type="text"/>

### Please enter details of any other charges on this property

Charge Type	<input type="text"/>
Company Name	<input type="text"/>
Account/ Reference Number	<input type="text"/>
Number of Bedrooms	<input type="text"/>

## Additional Details

Please enter any additional details about the property which may be relevant to this application:

## Third Party Contact – Valuation Details

Who should we contact  
for access to the  
property?

Name of Contact

Address Type

Flat Number

House or Building  
Name

House or Building  
Number

Street

District

Town

County

Postcode

Sub Country (i.e. England  
/Scotland/Wales)

## Other Third Party Details

Third Party Type

Telephone Number

Name of Contact

Email

## Your information

Barclays is committed to protecting your personal data. We will use your information for a number of different purposes, for example, to manage your account(s), to provide our products and services to you and others and to meet our legal and regulatory obligations. We may also share your information with our trusted 3rd parties for these purposes. For more detailed information on how and why we use your information, including the rights in relation to your personal data, and our legal grounds for using it, please go to [barclays.co.uk/important-information/control-your-data](https://www.barclays.co.uk/important-information/control-your-data) or you can request a copy from us.

## Credit reference agencies and fraud prevention agencies

In order to process your application we will supply your personal information to credit reference agencies and fraud prevention agencies and they will give us information about you, such as about your financial history. We do this to assess creditworthiness and product suitability, check your identity, manage your account, trace and recover debts and prevent criminal activity. These agencies may in turn share your personal information with other organisations. If fraud is detected, you could be refused certain services, finance or employment. Once you open an account with us, we will share account data with the credit reference agencies on an ongoing basis.

If false or inaccurate information is provided to us and fraud is identified, details may be passed to credit reference and fraud prevention agencies to prevent fraud and money laundering and to verify your identity.

The Credit Reference Agency Information Notice (CRAIN) describes how the three main credit reference agencies in the UK each use and share personal data. The CRAIN is available on the credit reference agencies' websites:

- [transunion.co.uk/crain](https://transunion.co.uk/crain)
- [equifax.co.uk/crain](https://equifax.co.uk/crain)
- [experian.co.uk/crain](https://experian.co.uk/crain)

Or you can ask us for a copy of these.

For more details on how information held by credit reference agencies and fraud prevention agencies may be used, please go to [barclays.co.uk/important-information/control-your-data](https://barclays.co.uk/important-information/control-your-data) or you can request a copy from us.

### Sharing information about you with tax authorities abroad

If we have reason to think that you are required to report your income or are subject to tax in another country, we may have to share information about your accounts with the UK or relevant tax authorities, either directly or via the local tax authority who may share that information with the appropriate tax authorities abroad. If we need to request extra documents or information from you about this, you must supply these. If you don't, you agree that we may close your account, or, if the law or other regulations requires us to do so, you agree that we may withhold parts of certain payments received into your account and pass withheld funds to the relevant tax authorities (this is more likely if you leave the UK and become resident for tax purposes in another country).

## Application Confirmation

### Contact Method

By providing us with your information, e.g. email address and/or mobile phone number, you agree that we and members of the Barclays Group may inform you by letter, telephone, text, email and other electronic methods about products and services (including those of others) that may interest you. If you prefer not to receive such communications, please tell us.

### Please tick the relevant boxes below

#### Do not contact by:

Mail  Phone  Other

### Solicitor Details

Name of Contact	<input type="text"/>	Street	<input type="text"/>
Name of Solicitor Firm	<input type="text"/>	District	<input type="text"/>
Address type – i.e. UK	<input type="text"/>	Town	<input type="text"/>
<input type="text"/>		Country	<input type="text"/>
<input type="text"/>		Postcode	<input type="text"/>
Flat Number	<input type="text"/>	Sub Country (i.e. England /Scotland/Wales)	<input type="text"/>
House or Building Name	<input type="text"/>		
House or Building Number	<input type="text"/>		

### Fee Payment

Fee Type	<input type="text"/>	Name on Card	<input type="text"/>
Fee Amount	<input type="text"/>	Card Number	<input type="text"/>
Paid Date	<input type="text"/>	Start Date (MM/YY)	<input type="text"/>
Payment Method	<input type="text"/>	Expiry Date (MM/YY)	<input type="text"/>
Card Type	<input type="text"/>	Card Issue Number	<input type="text"/>

## Verify Customer and Address

Please verify the details for customer.

### Interview Type

Face to Face

### Customer 1

### Customer 2

Non Face to Face

## Verification of Identity

Identification type

Date ID Provided

Start Date

End Date

Reference

## Verification of Address

Identification type

### Customer 1

### Customer 2

Date ID Provided

Date of Issue

Reference

Identification type

Date ID Provided

Date of Issue

Reference

Additional Application Information

### Your feedback

If you have a complaint about any aspect of our service then we would like to hear from you. You can contact us by phone, in person, or in writing, either by post or e-mail. Details of our complaints handling procedures are available on request from any branch, Barclays Group Information line on **0800 400 100\***, or [barclays.co.uk](https://www.barclays.co.uk)

**YOUR BUY TO LET PROPERTY MAY BE REPOSSESSED OR A RECEIVER OF RENT APPOINTED IF YOU DO NOT KEEP UP PAYMENTS ON YOUR MORTGAGE.**

You can request this in Braille, large print or audio. For information about all of our accessibility services or ways to contact us, visit [barclays.co.uk/accessibility](https://www.barclays.co.uk/accessibility)

### Call monitoring and charges information

\*Calls to 0800 numbers are free if made from a UK landline and international calls are charged at local rate, mobile costs may vary – please check with your telecoms provider. Calls may be recorded so that we can monitor the quality of our service and for security purposes.

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Item ref: 9913447\_UK. Created: 02/22