

MORTGAGE

Section: 1

About Your Mortgage

These questions allow us to understand your borrowing requirements.

1.1 Applicant name/s

1.2 Type of property
 Primary residence Secondary residence Holiday home Investment property (BTL)

1.3 Loan amount
 £

1.4 Estimated property value
 £

1.5 Repayment Method
 Capital and interest Interest only Part and Part Low Start - interest only for a period converting to capital repayment

1.6 Rate type
 Please state which fixed/tracker product(s)
 Fixed product only Tracker product only Mix of both products

1.7 Term of loan

1.8 If Interest only - please state how you will repay the balance
 Please select all that apply.
 Endowment Pension Savings and investments Sale of mortgage property
 Sale of other property Sale of other asset Other (provide details)

1.9 Source of deposit & stamp duty
 Source

1.10 What is your anticipated completion date?
 Month / Year

1.11 What is the purpose of the loan?
 If there is more than one purpose, please list all the purposes for which the loan proceeds will be used.

1.12 If this is a re-mortgage - when did you purchase the property?
 Month / Year

 Original purchase price
 £

1.13 If this is a purchase - what is the type of sale?
 Private sale Purchase from builder Purchase through agent
 Auction Purchase from family Purchase with an existing tenancy

1.14 If this is a buy to let - what is the estimated monthly rental income?
 Monthly rental income
 £

Section: 1 (continued)

About Your Mortgage

1.15 If this is a self-build or if refurbishment is required - estimate the cost of the work

Cost of the work

Projected value of the property once works are complete

How long will the work take to complete?

1.16 Will planning permission be required?

Yes No

1.17 Do you have financial protection in place?

Yes No

1.18 Would you like to review your protection needs?

Yes No

If yes, your banker will introduce you and share your contact details with our financial planning partners at Rathbones Group plc. They will be in touch to progress your enquiry and will inform us of the outcome.

Section: 2

About Your Security

These questions will allow us to get to know the basic information about the property/ies that will be used as security for your loan. If you have multiple properties you would like to borrow against, please complete Section 2 for each property.

2.1 Have you found a property yet?
If you have not yet found a property, you do not need to fill out the Section 2 of this form.

Yes No

2.2 Property address

House number / name and post code.

2.3 Who will be the registered owners of the property? Please confirm if personal, company, or trust name, and list all names.

2.4 Property type

If other, please provide details.

Detached house Semi-detached house Terrace house Bungalow Purpose-built flat Converted flat Multiple flats under single freehold

Other (provide details)

If your proposed security property is in a block which contains an external wall system (cladding) or balcony with a potentially combustible material in accordance with the guidance from the Royal Institute of Chartered Surveyors, the valuer will require sight of a EWS1 Form ("External Wall Fire Review") to complete the valuation report. Before paying your valuation fee Investec recommends establishing the existence of this form with the building's Landlord/Freeholder and that it confirms an adequate level of safety.

2.5 Tenure

If leasehold, what is the remaining lease?

Freehold Leasehold Share of Freehold Term of remaining lease

2.6 How many bedrooms does the property have?

Number of bedrooms

2.7 Is the property listed?

Grade I Grade II Grade II* Conservation area Not applicable

2.8 What year was the property built?

2.9 Occupancy details

Will you or your immediate family occupy the property?

If yes, please provide full name, relationship and date of birth for all family members over the age of 17 years. (Not to include borrowers)

Yes No

Full name	Relationship	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>

<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section: 3

Your Property Access Details

Completion of Section 3 is not required if purchase and estate agent particulars are provided

3.1 Contact name and relationship to the vendor
For example: estate agent, builder

Contact name

Relationship

3.2 Contact details

Contact number

Email address

3.3 Additional information

Section: 4

Your Conveyancer

It may be possible for your solicitor firm to act on behalf of Investec, as well as yourself, during the mortgage application. We call this dual representation. Before instructing them, please let us know your solicitor firm's details and we'll check if they're on our panel.

The fee you agree with your solicitor firm will cover the work they do on both yours and our behalf and won't feature in any mortgage illustration provided by Investec.

If we're unable to use your solicitor firm to act on our behalf, we'll need to appoint our own solicitor firm to act for us.

4.1 Conveyancer name/Firm name

4.2 Contact name

4.3 Contact number

4.4 Email address

4.5 Address

Number / name and post code.