

## Introducer details

Contact name:	<input type="text"/>
Company name:	<input type="text"/>
Telephone number:	<input type="text"/>
Regulatory status:	<input type="checkbox"/> Directly Authorised <input type="checkbox"/> Appointed Rep <input type="checkbox"/> Commercial Broker
Network or club name:	<input type="text"/> (if applicable)
Network FCA number:	<input type="text"/> (if applicable)
Individual FCA number:	<input type="text"/>

## Fees And Advice

Who is advising the client? Intermediary (you) <input type="checkbox"/> Positive Lending <input type="checkbox"/>	
Do you wish to add these fees to the loan? Telegraphic transfer fee <input type="checkbox"/> Lender fee <input type="checkbox"/> Packager fee <input type="checkbox"/>	
Are you charging the client a fee? Yes <input type="checkbox"/> No <input type="checkbox"/>	If yes, how much? £ <input type="text"/>
If yes, when are you charging the client? Upfront <input type="checkbox"/> On application <input type="checkbox"/> On offer <input type="checkbox"/> On completion <input type="checkbox"/> Add to loan <input type="checkbox"/>	

## Customer Vulnerability

Are you aware of any additional vulnerabilities that your client may have? Yes ☐ No ☐

**If you answer yes to this question, please provide further information below and continue on the Additional Details Page if necessary.**

## Loan details

How much would you like to borrow: £

What is the purpose of your loan?

Loan type: SVR ☐ BOE tracker ☐ Discounted ☐ Fixed ☐

If fixed, how many years?:

Loan term:

Repayment type: Repayment ☐ Interest only ☐

Is the loan to be secured against your residential or buy to let property? Residential ☐ Buy to let ☐

If buy to let, is the property? Residential buy to let ☐ Commercial buy to let ☐

## Your home address details

Living arrangements: Homeowner ☐ Tenant ☐ Living with parents ☐ Housing Association ☐ Council ☐

Address and postcode:

Date moved into this address: Month: Year:

If less than three years, previous address and postcode:

Date moved into this address: Month: Year:

Dependants:	Name:	Age:
	Name:	Age:
	Name:	Age:
	Name:	Age:

Anyone else living in the property?

## Security property details

If different from your home address, security address and postcode:

Do you or any member of your family live, or intend to live, in the property: Yes ☐ No ☐

Current property value: £

Date of purchase:

Purchase price: £

Property type (detached, terraced, flat, etc.):

If it is a flat, number of storeys in the block:

Construction type (brick & tile etc):

Tenure: Freehold ☐ Leasehold ☐ If leasehold, years remaining on lease: Years

## Security property details

If buy to let, is it a HMO (House in Multiple Occupation): Yes ☐ No ☐

Number of bedrooms:

Number of reception rooms:

On a shared ownership scheme? Yes ☐ No ☐

Property ever council owned? Yes ☐ No ☐

Is the property buy to let?: Yes ☐ No ☐

If yes, do you have more than 3 buy to let properties in your portfolio?: Yes ☐ No ☐

If yes, tenant type in buy to lets: Private tenants ☐ DSS ☐

Name of letting agents:

Name/s of tenant/s:

Name of letting agents:

Name/s of tenant/s:

Name of letting agents:

Name/s of tenant/s:

*If you own additional buy to let properties, please provide a copy of your portfolio*

## Applicant(s) personal details

Applicant 1:

Applicant 2:

Title:

Title:

First name:

First name:

Middle name(s):

Middle name(s):

Surname:

Surname:

Previous name(s):

Previous name(s):

Date of birth:

Date of birth:

Marital status:

Marital status:

Mobile telephone:

Mobile telephone:

Email:

Email:

Nationality:

Nationality:

National Insurance Number:

National Insurance Number:

Occupation:

Occupation:

Employer name:

Employer name:

Right to reside in the UK? Yes ☐ No ☐

Right to reside in the UK? Yes ☐ No ☐

Any criminal convictions? Yes ☐ No ☐

Any criminal convictions? Yes ☐ No ☐

Country of birth:

Country of birth:

## Employment details

Applicant 1:

Employed ☐ Self-employed ☐  
Retired ☐ Unemployed ☐

Self-emp: Ltd Co ☐ Partnership ☐ Sole trader ☐

Time in job: Year(s)

In probation period? Yes ☐ No ☐

Gross annual salary: £

Monthly take home pay: £

Annual bonus/overtime/commission: £

Any additional income received: £

Nature of additional income? eg. dividends,  
investment property, pension, etc.

Planned retirement age:

Applicant 2:

Employed ☐ Self-employed ☐  
Retired ☐ Unemployed ☐

Self-emp: Ltd Co ☐ Partnership ☐ Sole trader ☐

Time in job: Year(s)

In probation period? Yes ☐ No ☐

Gross annual salary: £

Monthly take home pay: £

Annual bonus/overtime/commission: £

Any additional income received: £

Nature of additional income? eg. dividends,  
investment property, pension, etc.

Planned retirement age:

## Self employment details

Applicant 1:

Nature of business:

Self-employment type: eg. sole trader / partner /  
director

Company name:

Date started:

Last 2 year's net profit:

Year: £

Year: £

Percentage of business:

If Limited Company Director, last 2 year's salary and dividends:

Year: Salary: £ Dividends: £

Year: Salary: £ Dividends: £

Applicant 2:

Nature of business:

Self-employment type: eg. sole trader / partner /  
director

Company name:

Date started:

Year: £

Year: £

Percentage of business:

Year: Salary: £ Dividends: £

Year: Salary: £ Dividends: £

## Your mortgage details

Current mortgage lender:

Mortgage account number:

Total balance outstanding: £

Monthly repayment: £

Term remaining on mortgage: Year(s)

Interest rate: %

Repayment type eg. repayment, interest only:

Mortgage rate type eg. fixed rate, variable rate:

Fixed rate expiry date, if applicable:

Have you made all of your mortgage payments in full over the last 12 months? Yes ☐ No ☐

Do you have any other loans or charges secured against the property? Yes ☐ No ☐

If buy to let, monthly rental income: £ per month. Is this net (after deduction of costs) ☐ or gross ☐

## Adverse credit

County Court Judgements (CCJs): Yes ☐ No ☐

Defaults? Yes ☐ No ☐

Debt Management Plans? Yes ☐ No ☐

Bankruptcy/IVA? Yes ☐ No ☐

## Your monthly expenditure

Electricity: £

Public Transport: £

Gas: £

TV & Broadband: £

Water: £

Recreation/Holidays/Entertainment: £

Landline/Mobile Phones: £

Clothing: £

TV Licence: £

Medical Expenses: £

Council Tax: £

Education: £

Ground Rent & Service Charges: £

Other Living Costs: £

Mortgage Payment Protection: £

Motor Insurance: £

Endowment: £

Health Insurance: £

Pension Contribution: £

Payment Protection: £

Childcare: £

Life Insurance: £

Maintenance: £

Dental Insurance: £

Shopping: £

Buildings Contents Insurance: £

Car Maintenance: £

Other Insurance: £

Fuel: £

*Please enter loan and credit commitments on the next page.*

## Loan and credit commitments

Please list ALL outstanding loans, credit/store cards, credit agreements (including 0% store purchases), hire purchase agreements, overdrafts, etc. If you are unsure if a credit commitment should be added to the table, please include it and we will advise.

[illegible]

## Declaration and Authorisation

In assessing the application, we will make enquiries about your client(s) including searching any records held by Credit Reference Agencies, Electronic Identity/Verification Systems and checking details with Fraud Prevention Agencies. If false or inaccurate information is provided and we suspect fraud we will record this. The Credit Reference and Fraud Prevention Agencies will keep details of any searches. Information held by the Credit Reference Agencies may already be linked to records relating to one or more of the financial associates.

For the purpose of this application your client(s) may be treated as financially linked and the application will be assessed with reference to any "associated" records. If it is a joint application or if you have told us of some other financial association with another person, you must be sure that you are entitled to (a) disclose information about any joint applicant and anyone referred to; and (b) authorise us to search, link or record information at Credit Reference Agencies. An association between joint applicants and between anyone you tell us is a financial partner will be created at Credit Reference Agencies. This will link financial records, each of which will be taken into account in all future applications. This will continue until a disassociation is successfully filed at the Credit Reference Agencies.

You confirm that your client(s) has/have given consent to us disclosing details of their application to Credit Reference Agencies, Fraud Prevention Agencies and our panel lenders. This information may be used to help us and other organisations to (a) assess the financial risk of dealing with them and other associates; (b) may be used to help make decisions on motor, household, credit, life and other insurance proposals and insurance claims; (c) administer agreements and insurance policies with them; (d) help prevent or detect fraud, prevent money laundering or other crimes, recover debts and trace debtors; and (e) for statistical analysis about credit, insurance and fraud.

The lender(s) we recommend may use "credit scoring" or other automated process in deciding whether to accept your client's application and during the life of their loan account. Lenders may use an initial soft search at the early stages of an enquiry, a full search on application and may recheck prior to or at completion.

### IMPORTANT CONSENT INFORMATION & ADDITIONAL NEEDS DECLARATION

**Please read this before you sign. Our full privacy statement can be viewed on our website.**

**1.** By completing this agreement and returning by email, or by printing, completing, signing and returning by post, you consent to us using and disclosing details as described above. References to "we" and "us" include any subsidiary or other company associated or affiliated with Positive Lending (UK) Ltd.

**At certain stages of the process we will be contacting the client, please tick all of the ways in which they are happy for us to contact them:**

☐ email    ☐ telephone (including voicemail)    ☐ SMS/Text messaging

You/they agree that telephone conversations and other communications between us or third parties may be recorded and/or monitored to assist in improving customer and collections services.

**2.** The consent given to use personal information we will assume expires on the completion of the loan or cancellation of this application if sooner. Full details of how we hold, process and manage personal information are explained within our privacy statement on our website.

**3.** By signing below you agree that we are able to approach all lenders to ensure we secure you the best option based on payment & criteria. If you do not agree to this please speak to our advisor.

**4. Please sign to confirm you have read, understand and agree to the terms above and you are providing permission for credit searches to be undertaken. If you are signing on behalf of your client, you confirm that you have their consent as above:**

Intermediary signature:

Date:

THINK CAREFULLY BEFORE SECURING OTHER DEBTS AGAINST YOUR HOME. YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE.

Positive Lending, Positive House, GP Centre, Yeoman Road, Ringwood, Hampshire BH24 3FF | 01202 850 830

Positive Lending (UK) Limited, trading as 'Positive Lending', is Authorised and Regulated by the Financial Conduct Authority FRN 607682

Registered Office: Positive House, GP Centre, Yeoman Road, Ringwood, Hampshire BH24 3FF. Registered in England and Wales No. 6700848

## Additional details

*Please provide any additional information to support this application:*

*Thank you for your enquiry*

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