

Limited Company data capture form: Mortgage Application

This application summary provides a record of the information being provided to Zephyr Homeloans as part of the mortgage application submitted on behalf of the borrowers referenced below.

Please note: The information provided in this document is essential to submit a full mortgage application and will be reviewed alongside the detail gathered at Decision in Principle (DIP) stage.

Applicants name(s):

If more than two applicants are applying for the mortgage please complete the 'Additional Applicants' form and attach to this document.

1. _____ 2. _____
3. _____ 4. _____

1. Limited Company Director or Limited Companies details

Limited Company Director 1

Limited Company Director 2

Title								
First name(s)								
Middle name(s)								
Surname								
Gender	Male	<input type="checkbox"/>	Female	<input type="checkbox"/>	Male	<input type="checkbox"/>	Female	<input type="checkbox"/>
Marital status								
National Insurance number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address								
Mobile telephone number								
Home telephone number								
Work telephone number								
Preferred contact method								
When would the applicant prefer to be contacted?								

Previous names (if any)

Title								
First name								
Middle name								
Surname								

2. Employment Details

	Limited Company Director 1	Limited Company Director 2
Company Name		
Company address		
Building name/number (if applicable)		
Address line		
Postcode		

2a. Applicant Self Employment Details

	Limited Company Director 1				Limited Company Director 2			
Is an accountant used to prepare accounts?	Yes		No		Yes		No	
<i>If yes, please provide accountant details:</i>								
Accountant details								
Accountant name								
Qualification								
Accountant acted since?	/ /				/ /			
Accountants address								
Building name/number (if applicable)								
Address line								
Postcode								

2b. Applicant Secondary Employment Details

	Limited Company Director 1	Limited Company Director 2
Company name		
Company address		
Building name / number (if applicable)		
Address line		
Postcode		

Please enter details of the buy to let portfolio overleaf (if applicable).

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3. Property Valuation – Access Details

Access contact	
Access contact name	
Access contact telephone number	
Additional access information	

4. Conveyancing

- Zephyr Homeloans operates a closed solicitor panel which will represent both your clients and their representatives.
- The current conveyancing panel will be displayed on the submission portal, one of the firms can be selected to act in this matter.
- If your client(s) would prefer to be represented by a different firm, they can contact the panel firm with details of their preferred conveyancers/solicitors (or ask your chosen firm to contact the panel firm directly) and they will arrange for the necessary documentation to be sent on.
- However, please be aware that, under the terms of your mortgage offer, you clients will be required to pay for the panel firm to act for us, in addition to any fees you are charged by your own representatives.

5. Direct Debit

- A Direct Debit form is located at the back of this document.
- Please ask your client's to complete and sign the form.
- Please upload this form to the account following the application being accepted.

