

# Data capture form: Individual 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. Applicant Details

	Applicant 1	Applicant 2
Title		
First name(s)		
Middle name(s)		
Surname		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
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"/> <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"/>
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

	Applicant 1	Applicant 2
Company Name		
<b>Company address</b>		
Building name/number (if applicable)		
Address line		
Postcode		

## 2a. Applicant Self Employment Details

	Applicant 1				Applicant 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

	Applicant 1	Applicant 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.

## Instruction to your bank or building society to pay by Direct Debit

Please fill in the whole form excluding official use box using a ball point pen and send it to:

Zephyr Homeloans  
PO Box 12  
Skipton  
BD23 2HL

Name(s) of account holder(s)

Bank/building society account number

Branch sort code

Name and full postal address of your bank or building society

To: The Manager Bank/building society

Address

Postcode

Reference

M 1 0 0 1

Service user number

1	6	9	1	6	6
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FOR Zephyr OFFICIAL USE ONLY

This is not part of the instruction to your bank or building society.

**Instruction to your bank or building society**

Please pay Zephyr Homeloans Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with Zephyr Homeloans and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date

Banks and building societies may not accept Direct Debit Instructions for some types of account

DDI1

**This guarantee should be detached and retained by the payer.**

### The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Zephyr Homeloans will notify you 4 working days in advance of your account being debited or as otherwise agreed. If you request Zephyr Homeloans to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Zephyr Homeloans or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
  - If you receive a refund you are not entitled to, you must pay it back when Zephyr Homeloans asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us