

Please complete this form as accurately as possible as missing information may affect our decision.

This application is for	<input type="checkbox"/> New business	DIP Reference	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/> Additional Borrowing	Reference	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Interest rate	<input type="checkbox"/> 2yr fixed	<input type="checkbox"/> 5yr fixed	
Repayments	<input type="checkbox"/> Repayment	<input type="checkbox"/> Interest only	
LTV option	<input type="checkbox"/> Maximum of 60%	<input type="checkbox"/> Maximum of 75%	
Fee	<input type="checkbox"/> With Fee	<input type="checkbox"/> Without Fee	
	<input type="checkbox"/> Add to loan	<input type="checkbox"/> Pay on application	
Broker fee (if applicable)	<input type="text"/>		

## Adviser Declaration

Before submitting business to us you must register through our online portal. Registration is quick and simple and can be found on our intermediary website at the following link:

[hodgebank.co.uk/intermediaries/registration](http://hodgebank.co.uk/intermediaries/registration)

Name of adviser	<input type="text"/>											
Company name	<input type="text"/>											
FCA reference number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Your firm						If relevant, your principle/network					
Office address	<input type="text"/>											
Email address	<input type="text"/>											
Contact telephone number	<input type="text"/>											
Date of advice	<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"/>
Mortgage club and/or network	<input type="text"/>											
If you are Directly Authorised please state which Club you would like to use as your payment route:	<input type="text"/>											
Broker fee (if applicable)	£ <input type="text"/>											

I confirm that the person who has arranged, advised and/or introduced this mortgage is authorised and qualified to do so. I confirm all documents provided are genuine copies of original documents that have been seen by me.

<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"/>
Signed		Print name				Date						

## Personal Information

	Applicant 1	Applicant 2
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="text"/> Other <input type="text"/>	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="text"/> Other <input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Full forename(s)	<input type="text"/>	<input type="text"/>
Previous name(s) in the last six years	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y
Nationality	<input type="text"/>	<input type="text"/>
What is your marital/ civil partnership status	<input type="text"/>	<input type="text"/>
Telephone/mobile number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>
Residential status	<input type="checkbox"/> Homeowner <input type="checkbox"/> Renting <input type="checkbox"/> Other	<input type="checkbox"/> Homeowner <input type="checkbox"/> Renting <input type="checkbox"/> Other
Current address	<input type="text"/>	<input type="text"/>
Time at address	<input type="text"/> Years <input type="text"/> Months	<input type="text"/> Years <input type="text"/> Months
Previous address (if less than three years) <small>Please provide details of any other addresses in this period in the additional information section.</small>	<input type="text"/>	<input type="text"/>
Time at address	<input type="text"/> Years <input type="text"/> Months	<input type="text"/> Years <input type="text"/> Months
Employment status	<input type="checkbox"/> Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Retired	<input type="checkbox"/> Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Retired

## Income Details

### Applicant 1

Employment status **Employed** (please tick)

Occupation

Date current employment started

Is the position permanent?

Age applicant intends to stop working

Annual basic gross salary £

Employer's name

Employer's address   
Postcode

### Applicant 2

Employment status **Employed** (please tick)

Occupation

Date current employment started

Is the position permanent?

Age applicant intends to stop working

Annual basic gross salary £

Employer's name

Employer's address   
Postcode

### Applicant 1

Employment status **Self-employed** (please tick)

Business name

Business address   
Postcode

Nature of business

Applicant shareholding

How long has this been owned by the applicant?

### Applicant 2

Employment status **Self-employed** (please tick)

Business name

Business address   
Postcode

Nature of business

Applicant shareholding

How long has this been owned by the applicant?

**Applicant 1**

**Applicant 2**

If applicant is self-employed:

Year

Year

Sole trader: two years net profit

 / 

 / 


Partnership: two years drawings

 / 

 / 


Company: two years salary and dividends

 / 

 / 


If the applicant income has reduced in the latest year or reflects a reducing trend, please provide details in the additional information section

Age applicant intends to stop working



Name of acting accountant and qualification (e.g. ACA)



Accountant's telephone number/email address



Accountant's address

  
  
  
  
  
  

Postcode

  
  
  
  
  
  

Postcode

Does the applicant have income from any other sources?

 Y  N

 Y  N

If Yes

If Yes

Source



Amount



Frequency



**Credit History**

If the answer is "yes" to any of the questions below, please provide details in the additional information section.

**Applicant 1**

**Applicant 2**

Has each applicant:

Had any CCJs or defaults in the last six years?

 Y  N

 Y  N

Entered into an IVA or debt management programme in the last six years?

 Y  N

 Y  N

Had any mortgage arrears or arrears on secured or unsecured borrowing in the last three years?

 Y  N

 Y  N

Been declared bankrupt within the last six years?

 Y  N Y  N

Ever been repossessed?

 Y  N Y  N

## Outstanding Unsecured Borrowing

For example, personal loans, hire purchase, mail order, credit cards or overdrafts

Applicant	Loan type	Balance outstanding	Monthly payment	To be repaid on completion
<input type="checkbox"/> App 1 <input type="checkbox"/> App 2	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
<input type="checkbox"/> App 1 <input type="checkbox"/> App 2	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
<input type="checkbox"/> App 1 <input type="checkbox"/> App 2	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
<input type="checkbox"/> App 1 <input type="checkbox"/> App 2	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
<input type="checkbox"/> App 1 <input type="checkbox"/> App 2	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
<input type="checkbox"/> App 1 <input type="checkbox"/> App 2	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N

## Existing Holiday Buy to Let Mortgage Details (if applicable)

Current lender

Balance outstanding

£

Will this mortgage be repaid on completion?

Contractual monthly payment

£

 Y  N

If not being redeemed, please provide further details

## Loan Requirements

Why is the applicant taking out this mortgage?

 House purchase Remortgage Raising new capital

Loan purpose  
(if for home improvements please provide basic details of the works and estimated costs)

Estimated value or agreed purchase price

£

Loan amount required

Term required

## About the Holiday Buy To Let Property

The applicant's property must be suitable security for the mortgage loan. Please complete this section as accurately as possible to ensure that any issues that could affect your application are identified early. Once you have submitted this application we will instruct a surveyor to visit the property to value it.

Security address details

If the property is currently marketed as holiday let, please provide the URL (web address)

Does the property meet our criteria?   Our acceptable property criteria are available on our website

There is no valuation fee for properties valued up to and including £1 million. For properties valued higher than this, please call us for a quote.

### Tenure

Type  Freehold  Leasehold  Commonhold  Absolute

If leasehold, remaining term

Annual service charge

How is the title held?  In one name  As beneficial joint tenants  As tenants in common

### Property type

Select property type  House  Bungalow  Flat/Maisonette

If house or bungalow  Detached  Semi-detached  Terraced/Linked

If flat/maisonette On what floor is it?  Number of floors in block

Is there a lift?

## Property information

Number of bedrooms

Age of property

 years

Date purchased

Annual service charge

 £

## Construction

External walls

Brick

Stone

Timber frame

Roof

Tile

Slate

Other

If timber frame, is the outer wall brick, block or stone?

 Y N

If flat roof, approx. % of total roof area

 %

## New builds

Is this a newly built property?

 Y N

If yes, is the property fully completed and habitable?

 Y N

If yes, does it have an NHBC or similar warranty?

 Y N

If it is a flat, is the whole block fully completed?  
(including all other flats and communal areas)

 Y N

## Multi Units

Does this property have multiple units?

 Y N

Description of units?

Do any units share facilities?

 Y N

If Yes, please give details

## Other factors

Is the property located in England, Wales or mainland Scotland?

 Y N

Is the property situated over, or in close proximity to, retail or business premises?

 Y N

Does the property have more than 20 acres of land?

 Y N

Are there any agricultural ties or restrictions on the property?

 Y N

Has the property ever been flooded or is it at significant risk of flooding?

 Y N

Has the property ever been subject to underpinning or major structural repair?

 Y N

Is the property held in trust?

 Y N

Has the property had solar panels fitted?

 Y N

If yes, are they owned outright or subject to a lease?

Owned outright

Subject to a lease

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## Holiday Buy To Let Rental Income

Low season weekly rental income

£

Mid season weekly rental income

£

High season weekly rental income

£

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## Access Arrangements on Property to be Mortgaged

Who should the valuer contact to gain access to the property?

Contact telephone number

If this is a purchase application please provide contact details, name and address of the estate agent



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## Your Mortgage Repayment Strategy

The applicant must have in place a suitable strategy for repaying the loan at the end of the term. You can use more than one repayment strategy.

What is the applicant's current plan at the end of the mortgage term?

Investments  Property  Stocks & shares  Other

Savings

Selling property

Other (please specify)

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## Direct Debit Payment

Your Direct Debit payment will be taken on the first of each month unless we are advised otherwise. If you require your payment to be debited from your account on a different day, please let us know below.

What is the applicant's preferred Direct Debit payment date  
(this must be between the 1st and 22nd of each month)



Please fill in this form and send it to us on online or to:

Hodge
One Central Square
Cardiff
CF10 1FS

**Names(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

**Instructions to your bank or building society to pay by direct debit**

**Service user number**

1	8	5	1	3	1
---	---	---	---	---	---

**Reference**

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

**Instructions to your bank or building society**

Please pay Hodge 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 Hodge and, if so, details will be passed electronically to my bank/building society.

Signature(s)
Date



### 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 Hodge will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Hodge 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 Hodge 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 Hodge asks you too
- You can cancel a Direct Debit at any time simply by contacting your bank or building society. Written confirmation may be required. Please also notify us.



## Declaration

I understand, confirm and agree the following:

### Use of your Personal Data

The personal details you give on this form will be subject to the provisions of the General Data Protection Regulations 2018.

The information will be retained only for as long as necessary in accordance with our Retention Policy by Hodge who is the data controller, and may be stored on paper or an electronic format.

The information held about you may be used for the following purposes:

- Administering your application
- Verifying your identity and anti-money laundering checks
- Assist in fraud prevention
- Reporting to regulators and authorities
- Market and product analysis.

The information held about you may be shared with the following parties:

- Hodge's approved service providers in relation to this application; Other members of Hodge's group, its subsidiaries and associated companies
- Regulators or authorities where required or permitted by law.

You have the right to request access to your personal information held by Hodge; to do so, this request must be made in writing using our Subject Access Request Process. Further information regarding this can be found on our website.

Telephone calls may be monitored and/or recorded in the interest of security and to help improve our service.

Hodge may also use your information to contact you about its products and services that it believes may be of interest to you.

Occasionally, we may have products and services that could be suitable for you. We would like your permission to contact you by phone, post, SMS or email.

Please confirm if you would like to hear from us about these services:

#### Applicant 1

By Phone

By Mail

By Email

By SMS

#### Applicant 2

By Phone

By Mail

By Email

By SMS

We will always treat your personal details with the utmost care and will never pass or sell your information to other companies for marketing purposes.

### Your rights as a data subject

At any point while we are in possession of or processing your personal data, you have the following rights:

- **Right of access** – you have the right to request a copy of the information that we hold about you as mentioned above
- **Right of rectification** – you have a right to correct data that we hold about you that is inaccurate or incomplete
- **Right to be forgotten** – in certain circumstances you can ask for the data we hold about you to be erased from our records
- **Right to restriction of processing** – where certain conditions apply you have a right to restrict the processing
- **Right of portability** – in certain circumstances, you have the right to have the data we hold about you transferred to another organisation
- **Right to object** – you have the right to object to certain types of processing such as direct marketing
- **Right to object to automated processing, including profiling** – protection against targeted marketing and decision making
- **Right to judicial review** - in the event that We refuse your request under rights of access, we will provide you with a reason as to why. You have the right to complain as per the subject access request process
- All of the above requests will be forwarded on should there be a third party involved in the processing of your personal data, i.e. if a data subject was to raise a Subject Access Request.

I agree to the Terms and Conditions of the account.

I have read and understood the Use of Your Personal Data declaration and consent to the use of my information for the purposes stated.

I declare that the information that I have provided is correct to the best of my knowledge and belief.

Please tick

## Declaration

### Credit searches and fraud prevention

Hodge will search credit reference and fraud prevention agencies to check your identity, credit status and help us to make decisions.

- Hodge will undertake a credit search against each applicant recorded on this form
- Information on applications will be sent to credit reference agencies and will be recorded by them
- The credit reference agency will check the details supplied against third party databases, public or otherwise
- A record of the search will be retained
- The credit reference agency may use the details provided to assist other companies for verification and identification purposes
- If we decline this application, we are not obliged to tell you the reasons behind our decision
- If you borrow from us, we will give details of your accounts and how you manage it/them to credit reference agencies. If you borrow and do not repay in full and on time, credit reference agencies will record the outstanding debt. This information may be supplied to other organisations by credit reference agencies and fraud prevention agencies to perform similar checks and to trace your whereabouts and recover debts that you owe. Records remain on file for six years after they are closed, whether settled by you or defaulted
- If false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention agencies to prevent fraud and money laundering
- Full details of what we do and how we, credit reference and fraud prevention agencies will use your information are published on our website. Alternatively, a copy can be sent to you on request. Please phone us on 0800 731 4076.

### Applicant 1

Signed

Print name

D

D

M

M

Y

Y

Date

### Applicant 2

Signed

Print name

D

D

M

M

Y

Y

Date

# Declaration

## Customer Declaration

- I confirm that I wish to proceed on the terms set out in the Decision in Principle.
- Where relevant, I enclose payment in order for a chartered surveyor to value my property. This is not a survey.
- I understand that this fee is not refundable, even if the property is not eligible for this mortgage. Payment of this fee does not mean that Hodge is obliged to accept my application.
- I understand that this mortgage will be subject to the Holiday Let Mortgage Terms and Conditions (These will be provided to you with any offer we issue but in the meantime, they can also be downloaded from our website and are available on request).
- I have the right to withdraw from this mortgage application at any time before it is complete and I have received the monies. However, if I withdraw, I will not receive a refund of any fees I have paid to Hodge and I may still be required to pay my financial adviser and solicitor for the work they have undertaken on my behalf.
- All the details in my Decision in Principle and this application are, to the best of my knowledge and belief, true and complete. If Hodge finds any to be untrue, it could affect my eligibility for the mortgage or reduce the amount I may borrow.

### Applicant 1

Signed

Print name

D

D

M

M

Y

Y

Date

### Applicant 2

Signed

Print name

D

D

M

M

Y

Y

Date

---

## Supporting Information (Adviser use only)

Application form

Have both applicants signed and dated the declaration in the Declaration section?

Direct Debit for signed and dated

Letter from holiday let agency to confirm low, mid and high rent



0800 138 9109



[mortgages@hodge.co.uk](mailto:mortgages@hodge.co.uk)



Customers: [hodgebank.co.uk](https://hodgebank.co.uk)

Advisers: [hodgebank.co.uk/intermediaries](https://hodgebank.co.uk/intermediaries)

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# HODGE