



PERSONAL DETAILS TAB

Personal Details

Title *

Select... **OUR TITLE FIELD** ▾

First Name *

Enter Here **OUR FIRST NAME FIELD**

Middle Name

Enter Here **OUR MIDDLE NAME FIELD**

Surname *

Enter Here **OUR SURNAME FIELD**

Maiden Name

Enter Here **OUR MAIDEN NAME FIELD**

Date of Birth *

dd/mm/yyyy **OUR DOB FIELD** □

Place of Birth *

Select... **OUR NATIONALITY FIELD** ▾

Expected Age of Retirement

Enter Here **OUR RETIREMENT AGE FIELD** (fact find tab)

Vulnerable

- DEFAULT TO "NO"

Vulnerability Description

Enter Here

Residential Status *

Owner Occupier **OUR RESIDENTIAL STATUS FIELD** ▾

Employment Status *

Employed **OUR EMPLOYMENT STATUS FIELD**

- Employment TAB

PACKE

Personal Details TABS Continued

Family

Marital Status

Select...

OUR MARITAL STATUS FIELD.

Number of Dependents 19 and Under

Enter Here

"0"

Contact

Mobile Number

Enter Here

OUR MOBILE FIELD

Home Telephone Number

Enter Here

Email

Enter Here

OUR EMAIL FIELD

b



Address TAB

Address History Employment History Additional Income

Address History

OUR
ADDRESS FILES
FROM APP INFO
TAB

Auto Fill with Previous Addresses

Select...

Address Status *

Select...

Address Lookup

Type a postcode

Enter the address manually

Moved In *

01/01/2025

"OUR DATE Moved In" FIELD

Add Additional Address

b

Employment TAB

Employment Details

Type *

Self Employed Sole Trader

"OUR EMPLOYMENT STATUS FIELD"

Employment Status *

Select...

"DEFAULT TO 'CURRENT'"

Employer

Enter Here

"OUR EMPLOYER NAME"

Job Title

Enter Here

"OUR OCCUPATION FIELD")

Industry

Enter Here

CAN WE LEAVE THIS BLANK?

Start Date *

dd/mm/yyyy

"OUR Employment START DATE: □



On Maternity Leave

Telephone

Enter Here

Salary

Net Monthly Income *

Enter Here

OUR NET MONTHLY

Gross Monthly Income *

Enter Here

OUR GROSS MONTHLY

Gross Annual Income *

Enter Here

OUR GROSS ANNUAL

Pay Frequency

Select...

DEFAULT TO MONTHLY

Pay Day

Enter Here

CAN WE LEAVE THIS BLANK?

Address

Address Lookup

Type a postcode



Enter the address manually

OUR EMPLOYERS ADDRESS INFO.

Delete

QUOTE TAG

Quote Property Details Property Charges Other Occupants Deceased Title Holders

Quote

Advance *

Enter Here

OUR LOAN AMOUNT FIELD

Term (Months) *

Enter Here

OUR TERM FIELD

Sub-product *

5 Years No ERC

DEFINIT TO 15 YEAR NO ERC

Fees

Broker Fee *

Enter Here

OUR BROKER FEE

Add to Loan

Broker Fee

Acceptance Fee

Application

Loan Purpose *

Select...

OUR LOAN PURPOSE FIELD

Loan Purpose Details

Enter Here

LEAVE BLANK IF POSSIBLE

Property DETAILS TAB

SHOULD AUTO FILL FROM ADDRESS TAB

Property

Auto Fill with Previous Addresses

Select...

IN TANDEM
System.

Address Lookup

Type a postcode



Enter the address manually

Valuation *

Select...

"OUR ESTIMATED VALUATION FIELD"

Type *

Select...

"OUR BUILD TYPE FIELD"

Floors

Select...

"LEAVE BLANK IF POSSIBLE"

Bedrooms *

Select...

"OUR NO BEDROOMS FIELD"

Title Number

Select...

"LEAVE BLANK IF POSSIBLE"

Tenure

Select...

"OUR TENURE FIELD"

Buy to Let

Self Funding

Needs Manual Valuation

} ALL DEFAULT TO 'No'

UK Country *

Select...

"OUR JURISDICTION FIELD"

EPC Rating

Select...

"OUR EPC FIELD"

PROPERTY CHARGE TAG

Property Charges

Charge Type *

Select...

DEFALT TO "MORTGAGE"

Balance * OUR

Enter Here

MORTGAGE BALANCE FIELD



Are You Consolidating?

Repayment Type *

Select...

DEFALT TO "CAPITAL + INTEREST"

Monthly Payment *

Enter Here

"OUR MORTGAGE PAYMENT" FIELD

Interest Rate

Enter Here

"OUR APPROX RATE FIELD (MORTGAGE)"

Remaining Term in Months

Enter Here

"OUR REMAINING TERM FIELD"



Add Another Charges

House

Terraced Property

Semi Detached Property

Detached Property

Flat/Maisonette

End Terrace House

Mid Terrace House

Semi Detached House

Detached House

Semi Detached Bungalow

Detached Bungalow

Converted Flat

Purpose Built Flat

Terraced Bungalow

Town House

End Terrace Bungalow

Mid Terrace Bungalow

End Terrace Property

Mid Terrace Property

Terraced House