

APP 1

# PERSONAL DETAILS TAB

## Personal Details

Title \*

Select...

OUL TITLE FIELD



First Name \*

Enter Here

OUL FIRST NAME FIELD

Middle Name

Enter Here

OUL MIDDLE NAME FIELD

Surname \*

Enter Here

OUL SURNAME FIELD

Maiden Name

Enter Here

OUL MAIDEN NAME FIELD

Date of Birth \*

dd/mm/yyyy

OUL DOB FIELD



Place of Birth \*

Select...

OUL NATIONALITY FIELD



Expected Age of Retirement

Enter Here

OUL RETIREMENT AGE FIELD

(FACT FIND TAB)



Vulnerable

— DEFAULT TO "NO"

Vulnerability Description

Enter Here

Residential Status \*

Owner Occupier

OUL RESIDENTIAL STATUS FIELD

Employment Status \*

Employed

OUL EMPLOYMENT STATUS FIELD

— EMPLOYMENT  
TAB

PAGE 1

# Personal Details TAB Continued

## Family

### Marital Status

Select...

OVL MARITAL STATUS FIELD

### Number of Dependents 19 and Under

Enter Here

DEFAULT TO "0"

### Number of Vehicles

Enter Here

DEFAULT TO "1"

## Contact

### Mobile Number

Enter Here

OVL MOBILE FIELD

### Home Telephone Number

Enter Here

### Email

Enter Here

OVL EMAIL FIELD

b



# Address TAB

Address History   Employment History   Additional Income

Address History

OUR  
ADDRESS FIERS  
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



# EMPLOYEE TAB

## Employment Details

Type \*

Self Employed Sole Trader

" OUR EMPLOYMENT STATUS FIELD "

Employment Status \*

Select...

DEFAULT TO "CURRENT" v

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 v

Pay Day

Enter Here

CAN WE LEAVE THIS BLANK.?

Address

Address Lookup

Type a postcode



Enter the address manually

OUR EMPLOYERS ADDRESS INFO. <sup>Delete</sup>

QUOTE

TAB

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

DEFAULT 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

property

SHOULD AUTO FILL FROM ADDRESS TAB

Auto Fill with Previous Addresses

Select...

Address Lookup

Type a postcode

Enter the address manually

IN TANDEM  
SYSTEM.

Valuation \*

Enter Here

OUR "ESTIMATED VALUATION FIELD"

Type \*

Select...

OUR "BUILD TYPE FIELD"

Floors

Enter Here

LEAVE BLANK IF POSSIBLE

Bedrooms \*

Enter Here

OUR NO. BEDROOMS FIELD

Title Number

Enter Here

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...

DEFAULT TO "MORTGAGE"

Balance \* OUR

Enter Here

MORTGAGE BALANCE FIELD



Are You Consolidating?

Repayment Type \*

Select...

DEFAULT 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