

# Family Assist DIP Assessment Sheet - Page 1

In order for your Decision in Principle to progress, please ensure the declaration is signed located at the bottom of this form.

Return this form by email to us at [dip@bucksbs.co.uk](mailto:dip@bucksbs.co.uk)

Company Name:	E-mail address:
Broker Name:	FCA No.:
Telephone Number:	Mortgage Club or Network:

## HOW DID YOU HEAR ABOUT US? Please click in the boxes below

<input type="checkbox"/> Criteria Hub	<input type="checkbox"/> Knowledge Bank	<input type="checkbox"/> Julie Hanif	<input type="checkbox"/> Help Desk or Network	<input type="checkbox"/> Bucks BS website
<input type="checkbox"/> Trigold	<input type="checkbox"/> Twenty7tec	<input type="checkbox"/> Claire Askham	<input type="checkbox"/> Mortgage Brain	

## Any other relevant information

Help us to help you by including all relevant information to support this case and help us to make a quick decision. Please include any known credit issues:

Applicants Details	Applicant 1	Applicant 2
Full Names		
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Date of Birth		
Marital status		
Nationality		
Ages of dependants		
Mortgage term		
Age at end of term		
Retirement Age		

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Mortgage Details		
Mover/Re-mortgage/FTB		Sale price (Mover) £
Purchase Price	£	Est. value (re-mort) £
New mortgage required	£	Term:
Existing mortgage balance (re-mort)	£	Source of deposit:
If re-mortgage, amount of additional borrowing and purpose	£	Purpose:
Any other properties owned YES/NO Please give details to include: Value, Outstanding Mortgage, Monthly Payment and Rental Income (if applicable)		
Rep/Interest Only - Please state repayment vehicle if Interest Only		
Property Type		
Freehold or Leasehold		Term of Lease
If a flat, number of floors		Age of Property
Standard Construction - YES/NO If 'NO' state type of construction:	Yes      No	Construction type:
Employment Details	Applicant 1	Applicant 2
Please indicate if your income has been affected by COVID-19 (If yes, please specify in the box)	Yes      No	Yes      No
Employed, Self Employed, Retired, Contractor, Other (If other, please specify in the box)		
Occupation/Nature of Business		
If Self Employed % Shareholding		
Time in job/Self Employment		
Annual Income	Basic £	Basic £
Monthly Net Income	£	£
Overtime/bonus	O/T £	O/T £
	Bonus £	Bonus £
	Other Income £	Other Income £
Year:	S. Emp £	S. Emp £
Year:	S. Emp £	S. Emp £
Year:	S. Emp £	S. Emp £
Year:	S. Emp £	S. Emp £

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<b>Outstanding Credit</b>			
Monthly commitments - Type	Name - Applicant 1, 2 or joint	Balance outstanding (if applicable)	Monthly payment Being repaid Y/N
		£	£
		£	£
		£	£
		£	£
		£	£
		£	£

**Please complete this section for parents or grandparents**

<b>Applicants Details</b>	<b>Applicant 3 - Parent or Grandparent</b>	<b>Applicant 4 - Parent or Grandparent</b>
Full Names		
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Address Details for last 3 years	House No./Name:	House No./Name:
Dates to and from	Road Name:	Road Name:
	Town:	Town:
	County:	County:
	Postcode:	Postcode:
Date of Birth		
Marital status		
Nationality		
Ages of dependants		

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**Parent / Grandparent Mortgage Details**

If different from home address. Please give the details of the property you are using for this transaction.	Address:	Name of lender:
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Estimated value	£
Existing mortgage balance	£

If there is an existing mortgage please check with the lender that they accept second charge on the property.

**Property Type**

Freehold or Leasehold

Number of bedrooms	Term of lease
If a flat, number of floors	Age of Property

Standard Construction - YES/NO                      Yes                      No                      Construction type:  
 If 'NO' state type of construction:

**Summary**

Product Required:	Interest Rate:	Repayment Type:
Loan Amount: £	LTV:	Term:
Arranged by:		Date:

**Mortgage Adviser Declaration (when signing on behalf of the Client(s) or Enquirer(s))**

I am aware that it is an offence to knowingly provide false, misleading or inaccurate information when applying for a loan on behalf of my client(s).

I confirm that I: \_\_\_\_\_  
 have authority to submit this form on the client's behalf and issued them with my own privacy notice.

I have made my clients aware that Buckinghamshire Building Society can make enquiries to third parties which includes credit reference agencies using the data I have provided.

I have informed my client that the Buckinghamshire Building Society Privacy Notice can be located on their website at the following address <https://www.bucksbs.co.uk/privacy-policy.html>. Alternatively this can be obtained directly from the Society by phoning 01494 879517 or emailing [mortgages@bucksbs.co.uk](mailto:mortgages@bucksbs.co.uk)

I confirm that I am duly authorised to act as Agent for all Enquirers (my clients) in connection with this application for a Decision in Principle.

I confirm that I am acting within my authority as Agent, that I have obtained the verbal/written consent of each individual, and that I am appropriately authorised to sign the Enquirer Declaration on their behalf.

Signature of introducer:	Date:
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If this is a joint application then in the event of death of one of the applicants, the mortgage must be affordable in the sole survivors own right.

**The DIP lending decision is valid for 3 months however mortgage products can be withdrawn at anytime so cannot be guaranteed. If an application is not received the customer's information will be deleted after a period of 12 months and the soft search data will be deleted after 90 days.**