

Buy for Uni – Intermediary Referral Form

Intermediary Details	
Firm name	
Broker name	
FCA number	
Authorisation status (Directly Authorised or Appointed Representative)	
Submission route (Direct, Network or Mortgage Club)	
Network name (if applicable)	
Network FCA number (if applicable)	

Please complete the form below and return to intermediaries@bibs.co.uk

Application Details	
Date form completed	
Is the customer actively looking to purchase currently? If no, when (approximately) would they be looking to purchase?	

PLEASE NOTE

In order to qualify for this product; both the student and parents must have been resident in England, Scotland, or Wales for a minimum of three years prior to application. The parent's property must be within England, Scotland, or Wales.

Student / Sole Proprietor					
Name					
Contact number					
Date of birth					
Address					
Have they been resident in the England, Scotland, or Wales for the last three years?					
University					
Course					
Length of course remaining	<table border="1"> <tr> <td></td> <td>years</td> <td></td> <td>months</td> </tr> </table>		years		months
	years		months		
Property location					
Property purchase price					
Deposit amount (if applicable)					
Rental income (not including the customer's contribution)					

PLEASE NOTE

In order to be eligible, the student requires an unconditional offer from a University based in either England, Scotland, or Wales. The Society is unable to progress enquiries where the student is yet to receive an unconditional offer.

Please note, the Society can consider lending against properties with a maximum of three bedrooms. Properties of four or more bedrooms are not acceptable to the Society for Buy for University mortgages.

Joint Borrower 1 (Details, income and expenditure)			
Name			
Contact number			
Date of birth			
Retirement date (either expected or already retired)			
Employed / Self Employed / Retired?			
Salary / Net profit (if self-employed, please provide previous 3 years net profit & 3 years most recent accounts)			
Marital status			
Other taxable income			
Council tax			
Loan 1 amount		Loan 1 payment	
Loan 2 amount		Loan 2 payment	
Credit card 1 (total balance)			
Credit card 2 (total balance)			
Other commitments: e.g. Mortgages / Monthly payments / School fees / Car loan / Car lease			
Number of financial dependents (please specify ages)			
Savings			

Joint Borrower 1 (Details of main residence)	
Address	
Have they been resident in the England, Scotland, or Wales for the last three years?	
Residential status	
Residential property value	
Outstanding mortgage (total facility amount if flexible mortgage)	
Term remaining	
Interest only or capital repayment	

If interest only, how do they intend to repay the mortgage?	
Current mortgage provider	
Current interest rate (%)	
Monthly payment	

Joint Borrower 2 (Details, income and expenditure)

Name			
Contact number			
Date of birth			
Retirement date (either expected or already retired)			
Employed / Self Employed / Retired?			
Salary / Net profit (if self-employed, please provide previous 3 years net profit & 3 years most recent accounts)			
Marital status			
Other taxable income			
Council tax			
Loan 1 amount		Loan 1 payment	
Loan 2 amount		Loan 2 payment	
Credit card 1 (total balance)			
Credit card 2 (total balance)			
Other commitments: e.g. Mortgages / Monthly payments / School fees / Car loan / Car lease			
Number of financial dependents (please specify ages)			
Savings			

Joint Borrower 2 (Details of main residence)

Address			
Have they been resident in the England, Scotland, or Wales for the last three years?			
Residential status			
Residential property value			
Outstanding mortgage (total facility amount if flexible mortgage)			
Term remaining			
Interest only or capital repayment			
If interest only, how do they intend to repay the mortgage?			
Current mortgage provider			
Current interest rate (%)			
Monthly payment			

PLEASE NOTE

Please give details of any foreseeable changes to the applicants' income or expenditure. Also provide any other details that may need to be considered, including payment issues or adverse credit (for either the sole proprietor or joint borrowers).

Intermediary Details	
Name	
Signed	
Date	
I wish to receive updates on the progress of this application. (Yes/No) We will also need the customer's consent for this.	
Intermediary contact details	

Customer Consent	
I am happy for my intermediary to receive updates on the progress of my application.	
Name	
Signed	
Date	