

## Out of plan assistance

**Please note: cases that fit criteria do not need to be referred**

This form should be completed in full when a case does not fit criteria, when “referral” is indicated in the plans or by product wizard on My Broker Venue.

Please complete this form in full and submit it with a full application form and all other pertinent information, for an in-principle decision.

### Section A

Broker name		Contact name	
Contact number		Email address	
Name of case			
Postcode		Date	

**Type of Charge:** First charge

**Property Category:** Residential owner-occupied  Buy to let   
Semi-commercial

**Product:** Term mortgage/loan  Bridging finance

Number of demerits (see criteria for description)		Current valuation	£	Market valuation	<input type="checkbox"/>
				90 Day FSV	<input type="checkbox"/>
Property type	A Type <input type="checkbox"/>	B Type <input type="checkbox"/>	C Type <input type="checkbox"/>		
Total loan amount (including Broker fee)	£	First charge lender	Conforming <input type="checkbox"/>	Non-conforming	<input type="checkbox"/>
Loan to value	%	Income source	Employed <input type="checkbox"/>	Self-employed	<input type="checkbox"/>
			DWP <input type="checkbox"/>	Private pensions	<input type="checkbox"/>
Applicant 1 income	£	Total <u>net</u> income	£	Income percentage	%
Applicant 2 income	£				

Which is the closest plan that this case does NOT fit?

Together residential mortgage e.g. 60%	
--	--

**Please note: cases that fit criteria do not need to be referred**

### Section B

On the plan you have detailed above what is the:

Maximum LTV ?	%	Minimum valuation?	£	Maximum loan?	£
Maximum income percentage?	%	Maximum number of demerits?		Maximum demerits in specified period? e.g. (2 in 6)	

<b><u>Reason for referral</u> and <u>additional merits</u> (please continue on additional sheet if required):</b>

Email: residentialapplications@togethermoney.com