



Property information form

This form is used to assess your eligibility for a Help to Buy: Equity Loan. If you are eligible, the information will be used to progress the purchase of your new home.

Starting a new application

- Allow plenty of time to complete this form. We recommend you allow at least one hour.
- Your completed property information form will need to be returned to us, along with your property reservation form.

Information you will need

You will need information to hand in order to complete some of the questions, including details of:

- the property you are interested in buying
- your income and expenditure
- your provider's solicitor
- your solicitor
- your bank account details
- your financial advisor or mortgage advisor

Please return your completed application form to your Help to Buy agent



Applicant(s) details

Is your application:	Single <input type="checkbox"/>	Joint <input type="checkbox"/>
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Applicant one (lead applicant):

Title:	
First name:	
Last name:	
Contact telephone number:	
Email address:	

Applicant two:

Title:	
First name:	
Last name:	
Contact telephone number:	
Email address:	

Lead applicant - Current property address

Address line 1:	
Address line 2:	
Address line 3:	
Town:	
County:	
Postcode:	

Property details

Site name:	
Selected property address:	
Local authority:	
Plot number:	
Provider:	
Expected build completion date:	
Expected purchase completion date:	
House type:	
Tenure:	
Number of beds:	



Third parties

Developer code:	
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Provider's conveyancer's details (this will be given to you by the developer)

Contact name:	
Address line 1:	
Address line 2:	
Address line 3:	
Town:	
County:	
Postcode:	
Email:	
Telephone number:	
Reference (if known):	

Applicant's solicitor details

Contact name:	
Address line 1:	
Address line 2:	
Address line 3:	
Town:	
County:	
Postcode:	
Email:	
Telephone number:	
Reference (if known):	



Financial advisor or mortgage advisor details

Contact name:	
Address line 1:	
Address line 2:	
Address line 3:	
Town:	
County:	
Postcode:	
Email:	
Telephone number:	

Purchase details

Full purchase price (£):	
Applicant's mortgage amount: [i.e. maximum amount to be obtained by applicant]	
Applicant's cash contribution or deposit (£):	
Applicant's mortgage term:	

The applicant confirms to the Help to Buy agent and the agency, that the above details are accurate and are agreed between the applicant and the Provider - the buyer's mortgage amount and cash contribution must reach a minimum of 80% (60% in London).



Financial details

Help to Buy: Equity Loan requested amount:	Between 5% and 20% - please state monetary value £..... Between 5% and 40% - please state monetary value £.....
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Income – applicant one

Basic employment income (annual, gross):	
Overtime, bonuses and commissions (annual, gross):	
Student loan monthly payment:	
Other gross salary MONTHLY deductions (total cost of deductions such as childcare vouchers, pension, and so on):	

Income – applicant two

Basic employment income (annual, gross):	
Overtime, bonuses and commissions (annual, gross):	
Student loan monthly payment:	
Other gross salary MONTHLY deductions (total cost of deductions such as childcare vouchers, pension, and so on):	



Debt – applicant one

Monthly loan/HP payments:	
Outstanding credit card balances:	

Debt – applicant two

Monthly loan/HP payments:	
Outstanding credit card balances:	

Additional household Income (monthly) – applicant one

Working tax credits:	
Child tax credits	
Child benefit:	
Disability allowance:	
Guaranteed maintenance income:	
Other income:	

Additional household Income (monthly) – applicant two

Working tax credits:	
Child tax credits	
Child benefit:	
Disability allowance:	
Guaranteed maintenance income:	
Other income:	

Monthly service charge (include ground rent and estate management charges):	
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Additional properties

Do any of the applicants own a residential property?	Yes	No
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If yes, please confirm the address:

Address line 1:	
Address line 2:	
Address line 3:	
Town:	
County:	
Postcode:	

Personal details

Applicant one - date of birth:	
Applicant two - date of birth:	
Number of adults to live in the property:	
Number of children to live in the property:	

NB Those of [18] years of age at the date of [] are adults and those below [18] years old at the date of [] are children.

The applicant confirms to the Help to Buy agent and the agency that the details given are accurate and acknowledges that this information shall be used to determine the applicant's eligibility for Help to Buy funding.



Terms and conditions

You must read this carefully

The applicant (subject to acceptance for the Help to Buy Initiative and proceeding to completion of the purchase of the Property) agrees to and directs that the equity loan funding that the Agency will provide (comprising a contribution of up to [20%¹] [40%²] of the Full Purchase Price) is paid direct to the Provider to enable it to reduce the Full Purchase Price of the Property.

The applicant acknowledges that the term of the Help to Buy: Equity Loan 'is usually for 25 years but may be longer depending on the terms of your mortgage (subject to earlier redemption in accordance with the equity loan provisions).

The applicant agrees and confirms by completing this application that if they own a residential property that they will sell their interest in that property (or properties) in advance of completing their purchase of the Property with the assistance of a Help to Buy: Equity Loan and that it is a condition of the equity loan that the Property which is the subject of the Help to Buy: Equity Loan will be the only residential property they have any interest in for the duration of the Help to Buy: Equity Loan.

The applicant further acknowledges that the agency has nominated an agent to administer Help to Buy: Equity Loans Target Group Limited, the mortgage administrator and that all correspondence and payments required under Help to Buy: Equity Loans will be addressed to the mortgage administrator.

The applicant declares for data capture purposes only (or if there is more than one applicant in relation to each applicant) that it is (they are) a:

UK National	
EEA Citizen	
Person with indefinite leave to remain	
Other (please state)	

The applicant confirms that they are:

Applicant one:

Member of the armed forces (serving personnel)	
Other	

Applicant two:

Member of the armed forces (serving personnel)	
Other	

¹ For properties outside of London

² For properties inside London



Your data

The applicant acknowledges that:

The Help to Buy agent will only process the given personal data of the applicant for the following purposes. The Help to Buy agent will hold your information in accordance with the Data Protection Act 2018.

Firstly, the processing and administering the applicant's application to participate in the Help to Buy Initiative if the applicant is approved.

Secondly, the Help to Buy agent may also share this information for the same purpose with the Agency, the Post Sales agent and other Help to Buy agents, with other organisations that handle public funds and the Provider.

Thirdly, the information may be used for anonymised statistical surveys and analysis – please request a copy of the cookies policy for more information. The Help to Buy agent may pass your information in confidence to the DCLG (Department for Communities and Local Government), and other third party providers – for more information about how your data is managed, please request a copy of the privacy policy.

All information the applicant gives to the Help to Buy agent on this form (and information resulting from contact with the applicant's landlord and/or employer) may be shared with the same only in relation to your application to participate in the Help to Buy Initiative.

All information will be treated in the strictest confidence. The Help to Buy agent, other Help to Buy agents, the Agency and the Provider, reserve the right to take up any references relating to applicants as the Help to Buy agent considers necessary and may also search the files of any credit reference agency which will keep a record of any such request.

The Help to Buy agent must protect the public funds it handles and so may use the information the applicant has provided on this form to prevent and detect fraud. Under section 29(3) of the Data Protection Act 2018 the information may be disclosed for purposes of crime prevention and detection.



Declaration

It is a criminal offence to fraudulently make a false declaration or withhold information reasonably required in connection with this application.

The applicant has read the above acknowledgement and confirms that the applicant has provided accurate and up-to-date information relating to the applicant's application for assistance under the Help to Buy Initiative.

The applicant understands that if it is found that false information has been given to obtain assistance under the Help to Buy Initiative either knowingly or recklessly, appropriate legal action may be taken and the Agency may take action under its Equity Mortgage.

The applicant authorises the Help to Buy agent to pass information submitted as part of its application to third parties, including third-party service providers and other government departments and agencies for the purposes of processing this application and statistical surveys and analysis of the Help to Buy Initiative.

We require third parties to respect the security of your data and to treat it in accordance with the law. For more information on how we manage your data, please request a copy of the privacy policy.

Direct debit information

This direct debit is to authorise your bank to debit the monthly fees which will fall due under the Equity Mortgage (which will be £1 per month for the first 5 years of the Equity Mortgage). We confirm that the direct debit information will only be used in the event that you purchase the property and enter into an Equity Mortgage with the Agency.

Applicant one

I agree to the above terms and conditions and declare that all information provided in this form is true and accurate (1st applicant):

Signed:

Dated:

Applicant two:

I agree to the above terms and conditions and declare that all information provided in this form is true and accurate (2nd applicant):

Signed:

Dated:



Instruction to your Bank or Building Society to pay by Direct Debit

Allpay Limited
Target Group
Imperial Way
Newport
NP10 8UH

Service User Number

5	0	5	0	7	7
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Name(s) of Account Holder(s)

Bank/Building Society Account Number

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Branch Sort Code

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Name & full postal Address of your Bank or Building Society

To: The Manager	Bank/Building Society
Address	
Postcode:	

For allpay Limited official use only. This is not part of the instruction to your Bank or Building Society. Please complete your address and telephone number.	
Address:	
Postcode:	
Telephone:	

Instruction to your Bank or Building Society

Please pay allpay Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Allpay Limited and, if so, details will be passed electronically to my Bank or Building Society.

Signature(s)
Date

Reference

M	G	R	T											
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Banks and Building Societies may not accept Direct Debit Instructions on some types of Account.

This Guarantee should be detached and retained by the Payer



The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit, allpay Limited will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request allpay Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by allpay Limited or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when allpay Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

[OFFICE USE ONLY]

Direct Debit payment details

Reference number			
First payment amount		Date of first payment	
Subsequent payments		Next due date	
Frequency of payment			
Area office (if applicable)			
Date of entry onto Webconnect			
Please enter the details of the customer, if different from those of the bill payer overleaf:			
Name			
Address			
Postcode			

Contact details	
Scheme	Help to Buy
Payment Reference	(See Reference on letter)
Telephone	
Mobile	
Email	

Payments will be collected on behalf of: Target Group
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Equal opportunities

The Help to Buy agent operates a policy of equal opportunities in all aspects of its work. No person or group of people applying for housing will be treated less favourably than any other person or group of people because of their sex, age, race, colour, ethnic or national origin. To help the Help to Buy agent maintain a record, it asks the applicant to tick the group to which it considers it belong.

How would you, the applicant, describe your ethnic origin?

WHITE	First App	Joint App	ASIAN OR ASIAN BRITISH	First App	Joint App		First App	Joint App
A1 British	<input type="checkbox"/>	<input type="checkbox"/>	C80 Indian	<input type="checkbox"/>	<input type="checkbox"/>	E15 CHINESE	<input type="checkbox"/>	<input type="checkbox"/>
A2 Irish	<input type="checkbox"/>	<input type="checkbox"/>	C90 Pakistani	<input type="checkbox"/>	<input type="checkbox"/>			
A3 Other	<input type="checkbox"/>	<input type="checkbox"/>	C10 Bangladeshi	<input type="checkbox"/>	<input type="checkbox"/>	E16 OTHER ETHNIC GROUP	<input type="checkbox"/>	<input type="checkbox"/>
			C11 Other	<input type="checkbox"/>	<input type="checkbox"/>			
						F17 QUESTION REFUSED	<input type="checkbox"/>	<input type="checkbox"/>
MIXED			BLACK OR BLACK BRITISH					
B4 White & Black Caribbean	<input type="checkbox"/>	<input type="checkbox"/>						
B5 White & Black African	<input type="checkbox"/>	<input type="checkbox"/>	D12 Caribbean	<input type="checkbox"/>	<input type="checkbox"/>			
B6 White & Asian	<input type="checkbox"/>	<input type="checkbox"/>	D13 African	<input type="checkbox"/>	<input type="checkbox"/>			
B7 Other	<input type="checkbox"/>	<input type="checkbox"/>	D14 Other	<input type="checkbox"/>	<input type="checkbox"/>			

Do you or any member of your household consider yourself to be disabled? Yes No

If yes, please give details _____

Do you or any member of your family use a wheelchair? Yes No

Are you related to a current or former Committee/Board member or officer of a Registered Social Landlord (Housing Association)? Yes No

If so, please give details _____

Name of member or officer _____ Name of Housing Association _____