

Regulated Bridging capture form

Instructions

1. Download and install Adobe Acrobat Reader. Alternatively, go to: <https://get.adobe.com/uk/reader>.
2. Open the Regulated Bridging mortgage data capture form in Adobe Acrobat Reader.
3. Complete the data capture form.
4. Click 'File > Save as' and save the PDF with an appropriate name.
5. Return the completed data capture form to us at: enquiries@lendinvest.com.

Packaging details & declaration

MORTGAGE CLUB

LendInvest works with several mortgage clubs. If you are submitting this application via one of these mortgage clubs, please provide the mortgage club below and we will use the club payment route.

Mortgage club: _____

BROKER DECLARATION

I confirm that I am acting (and am authorised by the applicant(s) to act) on behalf of the applicant(s) and have their permission to access their information and to supply it to you with this application and at any time during the life of the mortgage. I confirm that, to the best of my knowledge and belief, the information contained in this application is true. I confirm that a copy of this application will promptly, once submitted, be provided to the applicant(s).

I have read the Lending Privacy Policy, available at <https://www.lendinvest.com/terms-and-conditions/lending-privacy-notice> and will provide the applicant with a copy of this notice.

I confirm I have read and agree to the Broker Terms of Business, available at: <https://www.lendinvest.com/intermediaries/resources>.

MARKETING MATERIAL

You, or someone acting on your behalf, have the right to opt out of receiving some or all of the marketing communications we may send you at any time and can do so by (i) accessing your marketing preference centre and changing your preferences at <https://content.lendinvest.com/l/844313/2023-01-04/pmy7zv> (ii) emailing us at marketing@lendinvest.com or (iii) calling us on 020 3846 6880.

Applicant(s)

Part 1

How many applicants will be applying for this loan?

☐ One ☐ Two

IDENTITY (APPLICANT 1)

PERSONAL DETAILS

Title: _____ First name: _____

Last name: _____

Date of birth: _____

National Insurance Number: _____

Country of birth: _____

Nationality: _____

Marital status: _____

CONTACT DETAILS

Primary phone: _____

Secondary phone: _____

Email: _____

RESIDENCY

Do you have the right to live in the UK?

☐ Yes ☐ No

Has the applicant resided in the UK for the last 3 years?

☐ Yes ☐ No

If you don't have a permanent right to reside in the UK, we'll require additional information.

IDENTITY (APPLICANT 2)

PERSONAL DETAILS

Title: _____ First name: _____

Last name: _____

Date of birth: _____

National Insurance Number: _____

Country of birth: _____

Nationality: _____

Marital status: _____

CONTACT DETAILS

Primary phone: _____

Secondary phone: _____

Email: _____

RESIDENCY

Do you have the right to live in the UK?

☐ Yes ☐ No

Has the applicant resided in the UK for the last 3 years?

☐ Yes ☐ No

If you don't have a permanent right to reside in the UK, we'll require additional information.

Applicant(s)

Part 2

APPLICANT VULNERABILITY (APPLICANT 1)

Is the applicant considered vulnerable?

☐ Yes ☐ No

If Other, please specify vulnerability:

Please tick all that apply:

Health

- ☐ Acute illness
- ☐ Severe illness (undergoing treatment)
- ☐ Chronic illness
- ☐ Recovery from severe illness
- ☐ Physical disabilities
- ☐ Hearing or visual impairments
- ☐ Low mental capacity or cognitive disabilities
- ☐ Poor mental health
- ☐ Addictions

Resilience

- ☐ Low emotional resilience
- ☐ Lack of support structure
- ☐ Low or erratic income
- ☐ Over indebtedness
- ☐ Low savings
- ☐ Adjust to a recent life event
- ☐ Other

Life event

- ☐ Caring responsibilities
- ☐ Bereavement
- ☐ Relationship breakdown
- ☐ Non-standard requirements (eg ex offenders, refugees, care leavers)
- ☐ Gender transition
- ☐ Income shock
- ☐ Other

Capability

- ☐ Low knowledge or confidence in managing financial matters
- ☐ Poor or non-existent digital skills
- ☐ Learning impairments
- ☐ Poor literacy/numeracy skills
- ☐ Low English language skills
- ☐ Other

Who has provided this information?

☐ Customer ☐ Third party

Has explicit consent been given to provide this information?

☐ Yes ☐ No

APPLICANT VULNERABILITY (APPLICANT 2)

Is the applicant considered vulnerable?

☐ Yes ☐ No

If Other, please specify vulnerability:

Please tick all that apply:

Health

- ☐ Acute illness
- ☐ Severe illness (undergoing treatment)
- ☐ Chronic illness
- ☐ Recovery from severe illness
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Has explicit consent been given to provide this information?

☐ Yes ☐ No

Applicant(s)

Part 3

CURRENT ADDRESS (APPLICANT 1)

Address:

At address since:

Residential status:

☐ Owner ☐ Tenant ☐ With relatives ☐ Other

If Other, please specify residential status:

If owner

Home value (£):

Outstanding mortgage (£):

If tenant, with relatives or other

Has the applicant owned a UK property for the last 12 months?

☐ Yes ☐ No

☐ Use this address as the correspondence address?

CURRENT ADDRESS (APPLICANT 2)

Address:

At address since:

Residential status:

☐ Owner ☐ Tenant ☐ With relatives ☐ Other

If Other, please specify residential status:

If owner

Home value (£):

Outstanding mortgage (£):

If tenant, with relatives or other

Has the applicant owned a UK property for the last 12 months?

☐ Yes ☐ No

☐ Use this address as the correspondence address?

Part 4

PREVIOUS ADDRESS HISTORY (APPLICANT 2)

If applicant has lived at their current address for less than 3 years, please provide the applicant's previous addresses for the past 3 years, including the full address, residential status, start and end dates:

Applicant(s)

Part 5

PERSONAL FINANCES AND CREDIT (APPLICANT 1)

SOURCE OF INCOME

Employment type:

☐ Employed ☐ Self-employed

☐ Retired ☐ Other

If employed

Current employer:

Industry:

Job title:

Employed since:

Basic annual salary (£):

BONUS, OVERTIME AND COMMISSION

Total guaranteed annually – from previous tax year (£)

Total non-guaranteed annually – from previous tax year (£)

PERSONAL FINANCES AND CREDIT (APPLICANT 2)

SOURCE OF INCOME

Employment type:

☐ Employed ☐ Self-employed

☐ Retired ☐ Other

If employed

Current employer:

Industry:

Job title:

Employed since:

Basic annual salary (£):

BONUS, OVERTIME AND COMMISSION

Total guaranteed annually – from previous tax year (£)

Total non-guaranteed annually – from previous tax year (£)

Applicant(s)

Part 6

PERSONAL FINANCES AND CREDIT (APPLICANT 1)

If self-employed

Business name: _____

Industry: _____

Job title: _____

Self-employed since: _____

Last year's profit (£): _____

Taxable income – from previous tax year (£): _____

If other

Please specify employment type: _____

OTHER INCOME

Income amount (from previous tax year) (£) _____

Sources of income (£) _____

Total net income (after tax, NI and other deductions, from previous tax year) (£) _____

Total income amount (from previous tax year) (£) _____

PERSONAL FINANCES AND CREDIT (APPLICANT 2)

If self-employed

Business name: _____

Industry: _____

Job title: _____

Self-employed since: _____

Last year's profit (£): _____

Taxable income – from previous tax year (£): _____

If other

Please specify employment type: _____

OTHER INCOME

Income amount (from previous tax year) (£) _____

Sources of income (£) _____

Total net income (after tax, NI and other deductions, from previous tax year) (£) _____

Total income amount (from previous tax year) (£) _____

Applicant(s)

Part 7

CREDIT (APPLICANT 1)

Please indicate if the applicant has ever:

Been refused a mortgage?

☐ Yes ☐ No

Had a court judgment (including a CCJ) entered against them?

☐ Yes ☐ No

Been convicted of a criminal offence (other than motoring offences)?

☐ Yes ☐ No

Had a personal property repossessed?

☐ Yes ☐ No

Been declared bankrupt or entered into an individual voluntary arrangement?

☐ Yes ☐ No

Been an officer of a company in which a receiver or liquidator has been appointed?

☐ Yes ☐ No

Missed any secured loan/mortgage payments in the last 36 months?

☐ Yes ☐ No

If you answer yes to any of the above questions, please provide further details in the 'Additional Information' section at the end of this application form.

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☐ Yes ☐ No

Been an officer of a company in which a receiver or liquidator has been appointed?

☐ Yes ☐ No

Missed any secured loan/mortgage payments in the last 36 months?

☐ Yes ☐ No

If you answer yes to any of the above questions, please provide further details in the 'Additional Information' section at the end of this application form.

Security details

Part 1

How many securities will be included in this loan?

☐ One ☐ Two

SECURITY ADDRESS (APPLICANT 1)

Address: _____

SECURITY ADDRESS (APPLICANT 2)

Address: _____

ABOUT THE SECURITY (APPLICANT 2) - PART 1

Residential properties only

Please note that we can only accept pure residential properties for regulated bridge. If you have any questions please contact your BDM.

ABOUT THE SECURITY (APPLICANT 2) - PART 1

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Please note that we can only accept pure residential properties for regulated bridge. If you have any questions please contact your BDM.

PROPERTY CONDITION

We consider a property with an uninhabitable bathroom and kitchen to be in poor condition. An inaccurate description of the property's condition may affect the valuation fee and delay completion.

☐ Excellent ☐ Good ☐ Poor

☐ Requires refurbishment

Select property type:

- | | |
|---|--|
| <input type="checkbox"/> Basement flat | <input type="checkbox"/> Maisonette |
| <input type="checkbox"/> Bungalow | <input type="checkbox"/> New build flat |
| <input type="checkbox"/> Converted flats | <input type="checkbox"/> New build house |
| <input type="checkbox"/> Detached house | <input type="checkbox"/> Purpose-built flat(s) |
| <input type="checkbox"/> End-of-terrace house | <input type="checkbox"/> Semi-detached house |
| <input type="checkbox"/> Ex-local authority flat | <input type="checkbox"/> Studio flat |
| <input type="checkbox"/> Flat above commercial property | <input type="checkbox"/> Terraced house |
| <input type="checkbox"/> HMO | |

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| <input type="checkbox"/> HMO | |

Security details

Part 2

ABOUT THE SECURITY (APPLICANT 1) – PART 2

TENURE

Please note that we do not accept share of freehold tenures for regulated bridge. If you have any questions please contact your BDM.

☐ Leasehold ☐ Freehold

If leasehold

Year lease expires:

ABOUT THE SECURITY (APPLICANT 2) – PART 2

TENURE

Please note that we do not accept share of freehold tenures for regulated bridge. If you have any questions please contact your BDM.

☐ Leasehold ☐ Freehold

If leasehold

Year lease expires:

Part 3

Security details

Part 4

LOAN TYPE (APPLICANT 1)

Is this a remortgage or purchase of this security?

- ☐ Purchase ☐ Refinance ☐ Capital raise
☐ Refinance and capital raise

If purchase

Purchase price (£):

If refinance and/or capital raise

Amount used to refinance (£):

Date of purchase:

Reason for capital raise:

Amount used for debt consolidation (£):

Are we taking a 1st or 2nd charge on this security?

- ☐ 1st charge ☐ 2nd charge

If 2nd charge

Do you have consent from the 1st charge lender to apply for a 2nd charge?

- ☐ Yes ☐ No

LOAN TYPE (APPLICANT 2)

Is this a remortgage or purchase of this security?

- ☐ Purchase ☐ Refinance ☐ Capital raise
☐ Refinance and capital raise

If purchase

Purchase price (£):

If refinance and/or capital raise

Amount used to refinance (£):

Date of purchase:

Reason for capital raise:

Amount used for debt consolidation (£):

Are we taking a 1st or 2nd charge on this security?

- ☐ 1st charge ☐ 2nd charge

If 2nd charge

Do you have consent from the 1st charge lender to apply for a 2nd charge?

- ☐ Yes ☐ No

Security details

Part 5

LOAN TYPE (APPLICANT 1) – PART 2

Current lender:

Monthly mortgage amount (£):

Are payments up to date?

☐ Yes ☐ No

How much are arrears? (£)

LOAN TYPE (APPLICANT 2) – PART 2

Current lender:

Monthly mortgage amount (£):

Are payments up to date?

☐ Yes ☐ No

How much are arrears? (£)

Security details

Part 5

PLANS DURING THIS LOAN (APPLICANT 1)

WORKS PLANNED

Does the applicant intend to do any of the following to the property during the life of this loan? Select all that apply.

- ☐ Perform structural changes ☐ Demolish
☐ Obtaining planning approval ☐ Refurbishment

i Please provide a schedule of works or details of building plans in the Additional Information section at the end of this application form

VALUATION INFORMATION

Does the security have a working/habitable kitchen and bathroom?

- ☐ Yes ☐ No

Is there any other reason why the primary security might require a non-standard residential valuation?

- ☐ Yes ☐ No

EXIT STRATEGY

Exit strategy for this security

- ☐ Refinance ☐ Sale

If refinance

Proposed new lender:

Have you already obtained an Agreement in Principle from the exit lender?

- ☐ Yes ☐ No

If sale

Is this property currently on the market?

- ☐ Yes ☐ No

PLANS DURING THIS LOAN (APPLICANT 2)

WORKS PLANNED

Does the applicant intend to do any of the following to the property during the life of this loan? Select all that apply.

- ☐ Perform structural changes ☐ Demolish
☐ Obtaining planning approval ☐ Refurbishment

i Please provide a schedule of works or details of building plans in the Additional Information section at the end of this application form

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- ☐ Yes ☐ No

If sale

Is this property currently on the market?

- ☐ Yes ☐ No

Loan details

SOURCE OF DEPOSIT

Will you be funding the deposit for the purchase from a UK bank account?

☐ Yes ☐ No

Is any portion of the source of funds for the deposit a gift?

☐ Yes ☐ No

Please describe the source of funds for the deposit:

ADDITIONAL FEES



Separate solicitor representation

If your loan type is a purchase and you choose to select title insurance, we cannot offer you dual solicitor representation. If you would prefer dual representation you can remove title insurance.

Do you want to add Title Insurance?

☐ Yes ☐ No

How would you like to pay the Title Insurance Fee?

☐ Add fee to the loan ☐ Pay fee upfront

How would you like to pay the Arrangement Fee?

☐ Add fee to the loan ☐ Pay fee upfront

How would you like to pay the Funds Transfer Fee?

☐ Add fee to the loan ☐ Pay fee upfront

Key deal contacts

CONTACT FOR VALUATION ACCESS

The appointed valuer will phone the following contact directly to arrange access to the property.

Contact name: _____

Phone number: _____

SOLICITOR CONTACTS

CONTACT FOR LEGAL UNDERTAKING



Separate solicitor representation

If you are changing solicitor details from the details provided during your enquiry, please provide the new details below. Otherwise, leave blank. The law firm must have a minimum of 3 SRA approved managers. Please use <https://www.lawsociety.org> to check.

Name of firm: _____

Contact name: _____

Phone number: _____

Email address: _____

Firm address: _____

You are required to visit your solicitors office to sign your legal documents so please ensure your chosen lawyer is easily accessible.

Part 1

Please provide any additional information which you feel will assist your loan application. Providing more detail will speed up the processing of your loan.

PROPERTY PORTFOLIO

Please provide us with details of your property portfolio (not including your main residence). Please tell us the address, who owns it and their ownership percentage (%).

Additional information

Part 2

i Please consider including the following

- Purpose of the regulated bridge
- Security details (what is it, is it being lived in by the borrower/family member, tenanted, vacant, any schedule of works, etc.)
- Exit strategy (if its sale of another property, please provide those details as well)
- Details or sales particulars for the security (if applicable)
- Details of the borrower's experience
- Details of any existing planning permissions or consents
- Schedule of works or building plans

Customer declaration

Part 1

LendInvest Loans Limited ('LendInvest'), will assess the information you, or your broker on your behalf, have provided in your application and supporting documentation in order to decide whether or not to provide you with a loan.

ENSURE ALL APPLICATION DETAILS ARE ACCURATE

It is important that you ensure that the information that has been provided in your application and supporting documentation is correct. It is a criminal offence to knowingly or recklessly give false, inaccurate or misleading information when applying for a loan. If you have provided such information, you may be reported to the police and prosecuted.

If false or inaccurate information is provided and fraud is identified, details will also be passed to fraud prevention agencies ('FPAs') to prevent fraud and money laundering. Further details explaining how the information held by FPAs may be used can be obtained by visiting our website.

If you have any questions about the information which has been provided to us in your application, or you wish to change any of the information which has been provided to us in your application, please contact +44 (0)203 846 9476 or regbridgeops@lendinvest.com.

READ THE DECLARATIONS CAREFULLY

DECLARATION - PART 1

By signing this application, you, the undersigned:

1. Agree that you have read the Lending Privacy Notice available at <https://www.lendinvest.com/terms-and-conditions/lending-privacy-notice> and the ways in which LendInvest may use the data you have provided.
2. Confirm that the information given by you or your broker on your behalf as part of your application is true, accurate, complete and not misleading. You agree to notify LendInvest of any changes which have, or are likely to have an effect on the continuing accuracy of the information in your application and supporting documentation which may affect our willingness to provide you with a loan.
3. Agree that any solicitor acting for you may disclose to us any information or documentation that we ask for about the transaction or property which is the subject of this application and you waive any duty of confidentiality or privilege which may otherwise exist in relation to this loan transaction.
4. Agree that LendInvest and organisations with which LendInvest are affiliated or represented, that at any time provides or has any interest or prospective interest in this application may:
 - (a) Provide information to a mortgage insurer to assess the risk of providing mortgage insurance or to assess the risk of default.
 - (b) Seek from and use or give to another credit provider (including without limitation any other credit provider who has lent money on the same security) any information about your creditworthiness, credit standing, credit history or credit capacity. In particular, we may provide a credit opinion in relation to you.

(c) Provide any information contained in this application (and all information associated with this application) to any originator, finance consultant, financier, accountant, credit reference agency, FPA, lawyer or third party involved with the prospective finance to be provided to you or as deemed appropriate by LendInvest (in its sole discretion).

(d) Disclose any report or personal information about you to any organisation which may be required in relation to any form of securitisation of any finance, sale of notes or other form of transfer of the finance which may be provided.

(e) Provide information to guarantors, any person who proposes to guarantee or has guaranteed repayment of any credit provided to you.

5. You agree that we may make appropriate enquiries regarding immigration status to the Home Office, validation of information supplied within the application process to HM Revenue & Customs under the HMRC Verification Scheme, any Credit Reference Agency or any past/present employer, accountant, lender or bank in order to assess whether to accept your mortgage application, and also at periodic stages during the term of your loan.

6. You have read and considered the mortgage illustration provided by us about the product you have chosen and you have been advised by your mortgage broker or other adviser to apply for it. We have not provided any advice about the product and are not responsible for any advice you may have received from your advisors.

7. You acknowledge and understand that any telephone calls and emails relating to your application or mortgage may be recorded and monitored for security, quality and/or training purposes.

USE OF YOUR PERSONAL INFORMATION

Below is a condensed guide to the use of your personal information by LendInvest, Credit Reference Agencies ("CRAs") and Fraud Prevention Agencies ("FPAs").

You agree that you have read the Lending Privacy Policy available at <https://www.lendinvest.com/terms-and-conditions/lending-privacy-notice> and that your personal information may be used in accordance with the condensed guide and the Lending Privacy Policy.

1. When you apply to LendInvest for a loan and to open an account, LendInvest will check the following records about you and others (see 2 below):

- (a) our own,
- (b) those at CRAs. When CRAs receive a search from us they will place a search footprint on your credit file that may be seen by other lenders. They supply to us both public (including the electoral register) and shared credit and fraud prevention information,
- (c) those at FPAs.

We will make checks such as assessing this application for credit, and verifying identities to detect and prevent crime and money laundering. LendInvest may also register information about you and the conduct of your account with CRAs and FPAs and make periodic searches at CRAs and FPAs to manage your account with us.

Customer declaration

Part 2

2. If you are making a joint application or tell us that you have a spouse or financial associate, we will link your records together so you must be sure that you have their agreement to disclose information about them. CRAs also link your records together and these links will remain on your and their files until such time as you or your partner successfully files for a disassociation with the CRAs to break that link.

3. Information on this application will be sent to CRAs and will be recorded by them. Where you borrow from LendInvest, we will give details of your accounts and how you manage it/them to CRAs and to other third parties including other lenders. If you borrow and do not repay in full and on time, CRAs will record the outstanding debt.

This information may be supplied to other organisations by CRAs and FPAs to perform similar checks and to trace your whereabouts and recover debts that you owe. Records remain on file for 6 years after they are closed, whether settled by you or defaulted.

4. LendInvest may make searches of records at FPAs who may provide LendInvest with information about other applications made and any data recorded and they will record information about your application so that other users of the agencies may use the information in making their decisions.

5. If you give us false or inaccurate information and we suspect or identify fraud we will record this and may also pass this information to FPAs and other organisations involved in crime and fraud prevention.

6. If you have borrowed from us and do not make payments that you owe us, we will trace your whereabouts and recover debts.

7. We and other organisations may access and use from other countries the information recorded by FPAs.

HOW TO FIND OUT MORE

You have been provided with the link to our Lending Privacy Policy and a condensed version of how your data may be used where we check with CRA's and/or FPAs. If you have any questions please contact us as set out in the Lending Privacy Notice.

You can contact the CRAs currently operating in the UK; the information they hold may not be the same so it is worth contacting them all. They will charge you a small statutory fee:

• TransUnion, Consumer Relations 3115 Harvester Road, Suite 201 Burlington ON L7N3N8, or call 0330 0247574, or log on to <https://transunion.co.uk>

• Equifax PLC, Customer Service Centre, PO Box 10036, Leicester, LE3 4FS or call 0870 010 0583, or log on to <https://equifax.co.uk>

• Experian, Consumer Help Service, PO Box 8000, Nottingham NG80 7WF, or call 0800 013 8888, or log on to <https://www.experian.co.uk>

If you want to receive details of the relevant FPAs this can be obtained by writing to the Compliance officer, LendInvest Ltd, Two Fitzroy Place, 8 Mortimer Street, London W1T 3JJ or visiting <https://www.lendinvest.com>.

MARKETING MATERIAL

You, or someone acting on your behalf, have the right to opt out of receiving some or all of the marketing communications we may send you at any time and can do so by (i) accessing your marketing preference centre and changing your preferences at <https://content.lendinvest.com/l/844313/2023-01-04/pmy7zv> (ii) emailing us at marketing@lendinvest.com or (iii) calling us on 020 3846 6880.

By signing this application, you, the undersigned agree:

1. To the Applicant Declaration (part 1) section;
2. That any valuation commissioned by LendInvest (at the borrower's cost), whether in advance of a loan being provided or during the lifetime of the loan, is a mortgage valuation for the purposes of LendInvest only. The valuation is not a survey. The valuation will not be shared with or disclosed to the borrower and the borrower may not place any reliance on it. We recommend that you obtain your own survey upon which you can rely. LendInvest requires the borrower to pay for the valuation in advance. The valuation fee is non-refundable.
3. That, in order to mitigate fraud risk, the borrower and any other obligor will be required to sign the transaction documents in front of their solicitor (either in person or by video conference).
4. You have read the Lending Privacy Notice available at <https://www.lendinvest.com/terms-and-conditions/lending-privacy-notice> and have been provided with a copy of this notice.

APPLICANT 1 (IF APPLICABLE)

Name: _____

Signature: _____

Date: _____

APPLICANT 2 (IF APPLICABLE)

Name: _____

Signature: _____

Date: _____