

# PROPERTY APPLICATION FORM



BUILDING HOMES  
MAKING PLACES  
ENHANCING LIVES

## SECTION 1: BUYING OPTIONS

### Property:

Shared Ownership

Help to Buy

Other

## SECTION 2: ABOUT YOU

### First Applicant

### Second Applicant

Title	<input type="text"/>	<input type="text"/>
First Name	<input type="text"/>	<input type="text"/>
Middle Names	<input type="text"/>	<input type="text"/>
Last Name	<input type="text"/>	<input type="text"/>
Previous name (if applicable)	<input type="text"/>	<input type="text"/>
Any other name known by	<input type="text"/>	<input type="text"/>
Gender	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>
Relationship to first applicant	<input type="text"/>	<input type="text"/>
National Insurance Number	<input type="text"/>	<input type="text"/>
Current full address with postcode	<input type="text"/>	<input type="text"/>
How long at this address	<input type="text"/>	<input type="text"/>
Previous addresses if less than 3 years	<p>If lived at for less than 3 years, please also provide previous addresses with dates, i.e. 01/12 to 05/15</p> <input type="text"/>	<p>If lived at for less than 3 years, please also provide previous addresses with dates, i.e. 01/12 to 05/15</p> <input type="text"/>
Home telephone number	<input type="text"/>	<input type="text"/>
Mobile telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>
Which Borough/Local Authority do you live in	<input type="text"/>	<input type="text"/>
Which Borough/Local Authority do you work in	<input type="text"/>	<input type="text"/>

## SECTION 3: RESIDENCY

### First Applicant

Are you a British or European Union/  
European Economic Area citizen?

UK  EU  Neither

If not, do you have Indefinite Leave  
to Remain in the UK?

Yes  No

If not, when does your Leave  
to Remain in the UK end?

### Second Applicant

UK  EU  Neither

Yes  No

## SECTION 4: WHAT IS YOUR CURRENT ACCOMMODATION?

### First Applicant

Council tenant

Yes  No

Housing Association tenant

Yes  No

Temporary accommodation  
provided by your local authority

Yes  No

If yes to any of the above, what is the name,  
full address and telephone number of the  
council or Housing Association you are  
renting through?

Renting privately

Yes  No

A current homeowner

Yes  No

If you are a current homeowner, how much  
equity do you have in your current home?

A previous homeowner, when did you sell

Renting from your employer

Yes  No

Living with family and friends

Yes  No

### Second Applicant

Yes  No

Yes  No

Yes  No

Yes  No

Yes  No



Yes  No

Yes  No

## SECTION 5: EMPLOYMENT DETAILS

### First Applicant

Job title

Employer's name

Employer's Head Office  
full address & postcode

How long have you worked in your current role?

Are you permanently employed?

Yes  No

Are you employed on a contract?

Fixed  Not applicable   
Temporary  If you tick this box  
please go to section 6

Contract start date

Contract end date

Are you current, ex-serving,  
or partner of MoD personnel?

Yes  No

Are you employed by a Local Authority  
or Housing Association

Yes  No

### Second Applicant





Yes  No

Fixed  Not applicable   
Temporary  If you tick this box  
please go to section 6



Yes  No

Yes  No

## SECTION 6: CREDIT CHECK

### First Applicant

### Second Applicant

Have you ever failed to keep up on a loan or any form of credit agreement?

Yes  No

Yes  No

Do you have any unsatisfied county court judgements?

Yes  No

Yes  No

Have you entered into an individual voluntary credit agreement?

Yes  No

Yes  No

Have you been behind in paying your rent over the last 12 months?

Yes  No

Yes  No

If yes, are you still in rent arrears?

Yes  No

Yes  No

Have you been declared bankrupt within the last 6 years?

Yes  No

Yes  No

If yes, then please provide the date?



## SECTION 7: FINANCE

### Income

### First Applicant

### Second Applicant

What is your total annual salary before deduction (to include London weighting, excluding overtime and bonuses)?



If applicable, please state how much you earn in overtime, bonuses and commissions annually



If applicable, please state a monthly figure for any other source of income you may have



If applicable, please state a monthly figure for your income from working tax credits



If applicable, please state a monthly figure for your income from disability allowance



If applicable, please state a monthly figure for your guaranteed income from maintenance payments



What are your total savings?



How much are you able to contribute towards a deposit?



Are you self-employed?

Yes  No

Yes  No

If yes, can you provide two years of audited accounts?

Yes  No

Yes  No

### Expenditure

Do you have any loans or hire purchases?

Yes  No

Yes  No

If yes, please answer the questions below



How much is the outstanding amount?



How much are the monthly repayments?



What is the loan for?



What date is the final payment?



If applicable, what is the total balance on your credit cards?



How much do you pay monthly in rent, mortgage or board?

## SECTION 8: WHO ELSE WILL BE LIVING WITH YOU?

	Person 1	Person 2	Person 3	Person 4
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
What is their relationship to you?	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employment status	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Will they be contributing to your mortgage payments?	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
What is their annual salary?	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## SECTION 9: EQUALITY QUESTIONS

### What if your ethnic group?

#### First Applicant

#### Second Applicant

##### White

English/Welsh/Scottish/  
Northern Irish/British

Irish

White other

##### White

English/Welsh/Scottish/  
Northern Irish/British

Irish

White other

##### Mixed/Multiple Ethnic Groups

White & Asian

White & Black African

White & Black Caribbean

##### Mixed/Multiple Ethnic Groups

White & Asian

White & Black African

White & Black Caribbean

##### Asian/Asian British

Pakistani

Indian

Bangladeshi

Chinese

##### Asian/Asian British

Pakistani

Indian

Bangladeshi

Chinese

#### First Applicant

#### Second Applicant

##### Black/Black British

African

Caribbean

##### Black/Black British

African

Caribbean

##### Other Ethnic Group

Arab

Other

Prefer not to say

##### Other Ethnic Group

Arab

Other

Prefer not to say

##### What is your religion?

No religion

Christianity

Buddhism

Hinduism

Judaism

Islam

Other

##### What is your religion?

No religion

Christianity

Buddhism

Hinduism

Judaism

Islam

Other

### Disabilities

#### First Applicant

Do you consider you or any member of your household to be disabled?

Yes  No

Are you or a member of your household registered disabled?

Yes  No

#### Second Applicant

Do you consider you or any member of your household to be disabled?

Yes  No

Are you or a member of your household registered disabled?

Yes  No

#### First Applicant

Are you or a member of your household a wheelchair user?

Yes  No

What is your sexuality?

#### Second Applicant

Are you or a member of your household a wheelchair user?

Yes  No

What is your sexuality?

## SECTION 10: HOW DID YOU HEAR ABOUT THE PROPERTY?

Current Housing Association tenant	<input type="checkbox"/>	Leaflet / Flyer	<input type="checkbox"/>
Optivo website	<input type="checkbox"/>	Site signage	<input type="checkbox"/>
Other website/property portal	<input type="checkbox"/>	Local Authority	<input type="checkbox"/>
Email	<input type="checkbox"/>	Exhibition	<input type="checkbox"/>
Press	<input type="checkbox"/>	Word of Mouth	<input type="checkbox"/>

Please note: Terms and conditions apply. All of the homes advertised on our website are subject to availability, eligibility and successful credit check.

# IMPORTANT INFORMATION: PLEASE READ

## Data Processing Notice and Consent

Optivo is a data controller for the purposes of the Data Protection Act 2018 and the General Data Protection Regulation ("GDPR"). Optivo and/or the sales agents appointed will collect, store and process your personal data in order to carry out our obligations to you arising under this agreement and any subsequent agreement entered into in connection with the purchase of a property sold by Optivo, and to provide you with the information, products and services that you request from us. Sensitive personal data such as racial or ethnic origin, offences (including alleged offences) and physical and mental disabilities are required under the Equal Opportunities Monitoring Statute. We will process your personal data in accordance with our Privacy Policy.

## Do you have a preferred contact method for marketing communications?

Email  Phone call  SMS message  Post

Should you wish to withdraw your consent at any time, you can do so by emailing [resales@optivo.org.uk](mailto:resales@optivo.org.uk)

## Credit checking

Optivo and / or the sales agent appointed may contact credit reference agencies to authenticate and verify your identity and credit status; these agencies will also keep a record of any such request. The scope and extent of the gathering of information from third parties depends on what type of service you are requesting from us. By signing this, you consent to your personal data being used for these purposes and any information collected from credit reference agencies to be stored on your account. gathered.

## References

Optivo and / or the sales agent appointed will take up any references relating to your application from your landlord and/ or employer.

## Sharing your data

We may be required to share some of your personal information with other organisations that handle public funds: this is for verification details, and to prevent and detect fraud and/ or crime. We will limit the information shared to what is necessary for the performance of this duty.

Optivo and the sales agent appointed may use the information you give to us to provide you, or permit selected third parties to provide you, with information about goods or services we feel may interest you. This may include information from financial advisers, solicitors and surveyors. The information may be used for surveys. We may disclose information to government departments, research organisations or agencies working on our, and on their own behalf, who may contact you.

By ticking the box below, you consent to Optivo and /or the sales agent appointed disclosing your personal information to selected third parties.

Opt in to be contacted by third parties

## Declaration

I/we understand that;

- It is a criminal offence to knowingly or recklessly make a false declaration or withhold information in connection with this application.
- If it is found that false information has been given to obtain housing either knowingly or recklessly, appropriate legal action may be taken by the Housing Association, Local Authority or Developer selling the property or their housing association, local authority or developer client of any leasehold tenancy granted.
- As a local authority, housing association or other public sector tenant, I/we will be required to give up my rented home on the day of completion if I buy or rent through any low cost home ownership product.
- If I/we own or have an interest in a property now or previously, I/we will be required to sell before exchange of contracts or taking up a lease.
- I/we authorise Optivo selling the property to pass information to Help to Buy agents, partner housing providers, credit reference agencies and to sales agents who may be able to assist in locating properties for applicants.
- If any of the information provided changes I will inform Optivo before the sale completes.
- I/we authorise Optivo to send me/us promotional material for new homes and events.
- I/we have included an up-to-date rent statement and/or reference.
- I/we have read the above and confirm that I/we have provided accurate and up to date information relating to my/our application for home ownership.

Print

Sign

First Applicant

Second Applicant

Please check you have filled in all sections, otherwise the form will be returned to you.



Grosvenor House 125 High Street  
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[resales@optivo.org.uk](mailto:resales@optivo.org.uk)