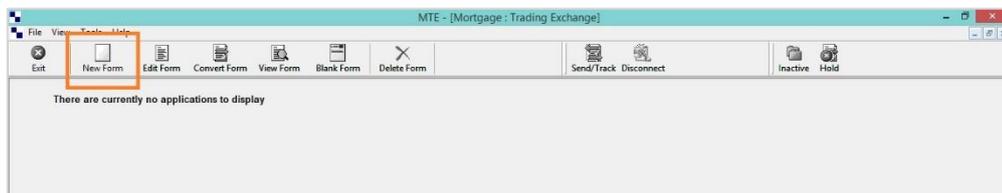


Completing an application form

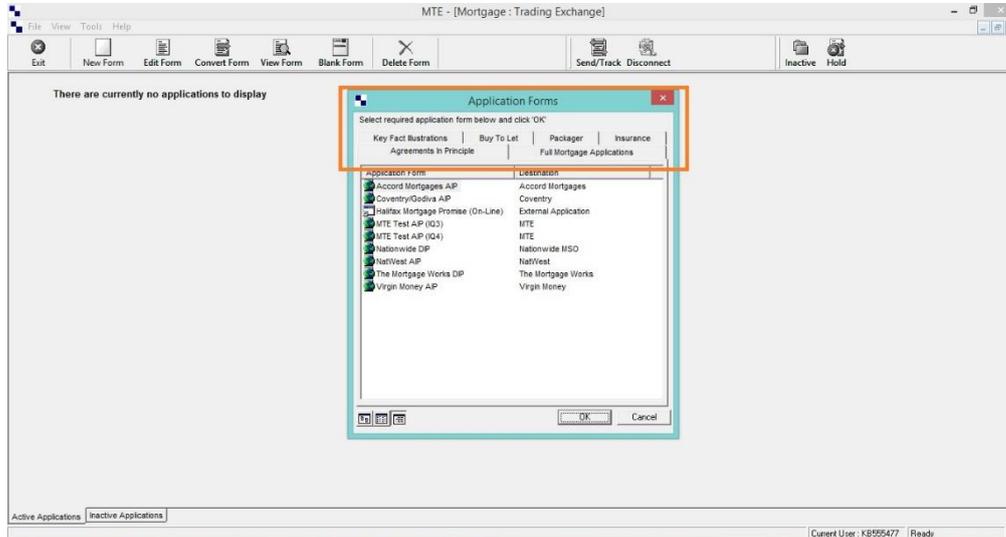
There are two ways to access MTE to complete a form. If accessing MTE from the Launch screen of MortgageBrain Classic, you can choose whether to complete a form for a brand new client, not previously used for sourcing. Alternatively, within the sourcing screen of MortgageBrain Classic, you can choose to complete a form with existing client details. Using the second option will allow the form to prepopulate with data already collected on your client.

First, this section will show completing a form with a brand new client.

Having logged in to MTE, you will see a row of buttons at the top of the screen. By clicking on the **New Form** icon, this will allow you to select your required application form from the list available on MTE.

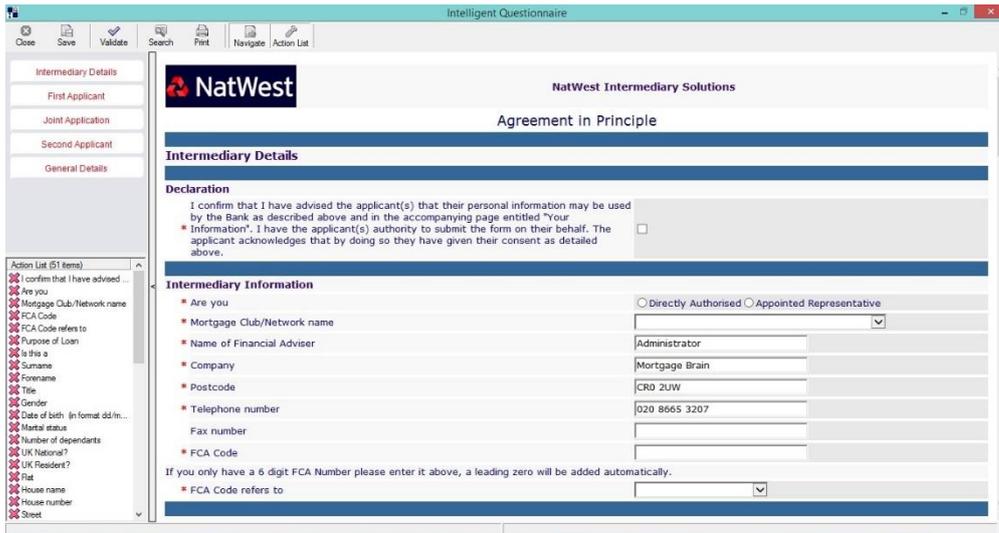


You will see that the list is divided into Agreements In Principle; Full Application Forms, Key Facts Illustrations, Buy to Let, Insurance and Packager.



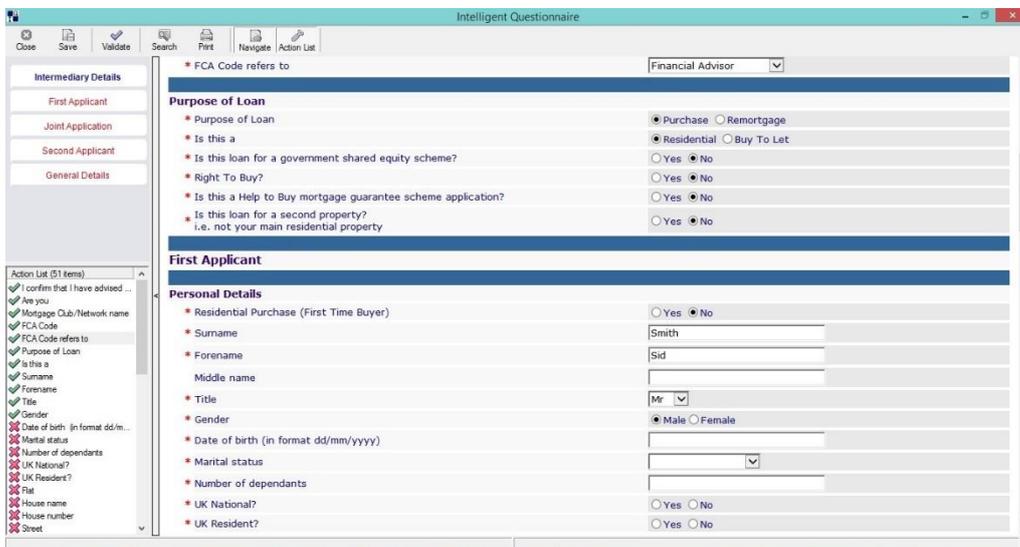
Simply select the form that you wish to complete from the relevant tab and click OK. For demonstration purposes, this guide shows an AIP being completed.

On opening the form, the screen is divided into two sections, question sets on the left hand side with an **Action List** underneath and the form on the right. You can choose to click on the question set which will 'jump' you to the relevant fields within the form itself. Alternatively, you can simply complete the form by using your mouse to move to the next question.

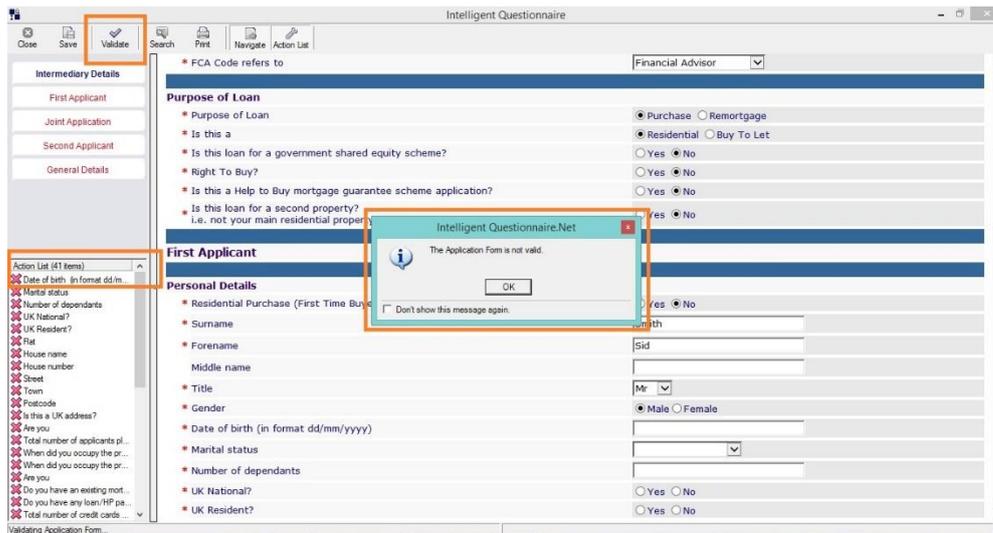


MTE doesn't need to be connected to the internet for you to complete forms, this means that should your client not have all the information to hand when you are applying for their mortgage you can always store the application and finish it at a later date.

The Action List details all the mandatory fields which must be completed before your form can be submitted to the lender. As you answer these questions and move to the next, you will notice that the red crosses change to green ticks to indicate that the question has been completed.



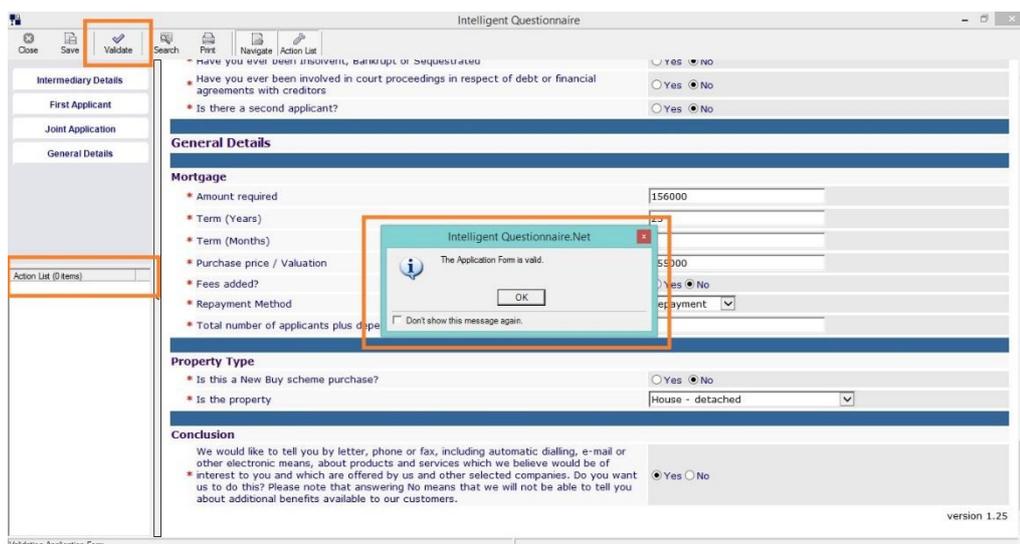
At any time, you can refresh the Action List items to see if the form is Valid, meaning the mandatory fields are all complete.



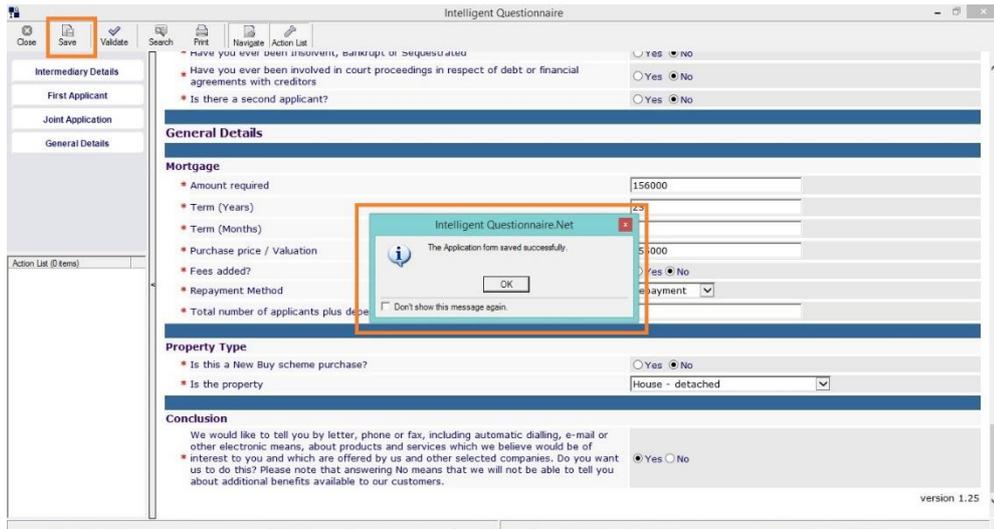
You can also save and edit the form as many times as is necessary. So, if you have to wait for the client to provide further information, simply save the form and return to it at a later stage once you have received the required information.

You will also notice, as you work your way through the form, that each of the forms contains **hide and reveal** sections. Depending on the answer provided to a question depends on whether there are further questions to answer. For example, if your client is 'employed', further questions will appear asking about their employment history. If your client is 'self-employed', further questions will appear asking about the number of years' accounts available, etc.

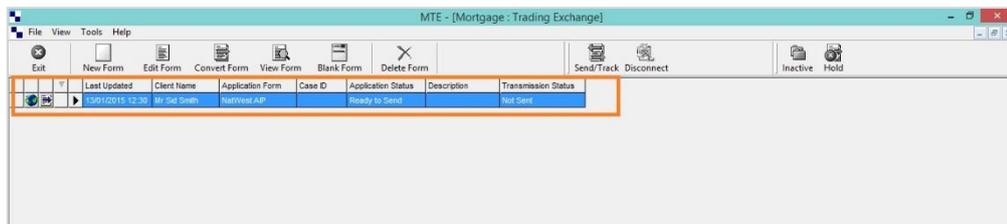
Once all of the action list questions have been completed, click on the validate button to confirm the form is complete.



Next, save the form and close it down.



The form is then entered into the main grid of MTE and will show that the form is **Ready to Send** (see **Application Status**) but it has not yet been sent to the lender (see **Transmission Status**).



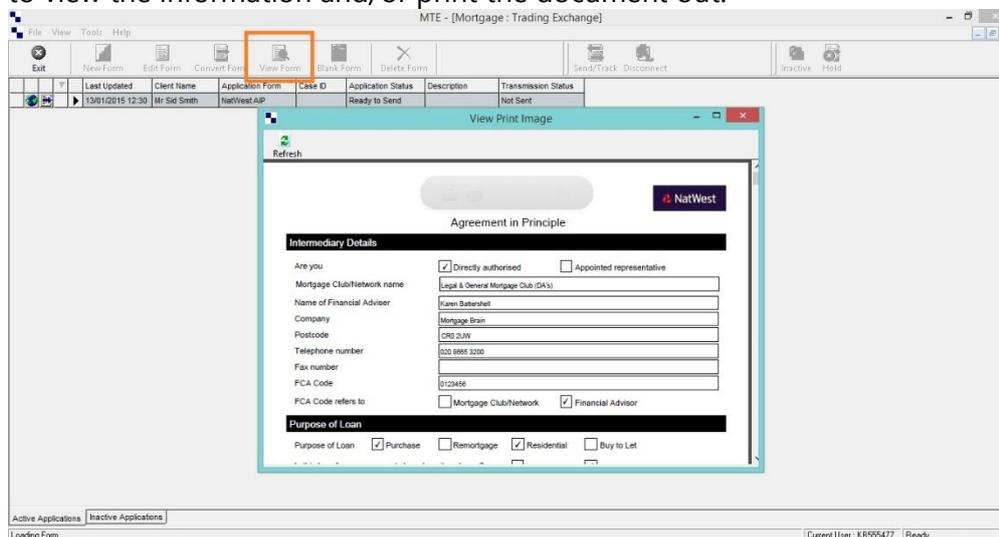
Last Updated	Client Name	Application Form	Case ID	Application Status	Description	Transmission Status
13/01/2015 12:33	Mr Sid Smith	NatWest AP		Ready to Send		Not Sent

Editing an application form

If you wish to edit an existing form to amend information, then this can be done as many times as is required before the form is sent to the lender. Simply ensure that the form is highlighted in the grid and click on the Edit Form button to open it up.

Viewing an application form

If you simply wish to view information contained within an application form, then this can be done by using the View Form button. MTE will open up the form in a PDF format, allowing you to view the information and/or print the document out.



Agreement in Principle

Intermediary Details

Are you Directly authorised Appointed representative

Mortgage Club/Network name: Legal & General Mortgage Club (GAs)

Name of Financial Adviser: Karen Battershill

Company: Mortgage Brain

Postcode: CR9 2JW

Telephone number: 020 8665 3200

Fax number:

FCA Code: 0129456

FCA Code refers to: Mortgage Club/Network Financial Adviser

Purpose of Loan

Purpose of Loan: Purchase Remortgage Residential Buy to Let