

# Full Application Journey

For Intermediary use only



PROGRESSIVE  
BUILDING SOCIETY

April 2025

# About this Guide

This guide will provide you with an overview of the full application journey for brokers. It will explain how to create an illustration, how to convert this into a Decision in Principle (DIP), and then generate this into an application for you to submit on behalf of your client(s) via the broker portal.

If you need any help generating a Decision in Principle or have any questions regarding our broker portal in general, please call our Online Support Team on 0800 0294 997. Lines open Monday – Friday, 9.00am – 5.00pm. Alternatively, write to our head office: 33-37 Wellington Place Belfast BT1 6HH.

# Full Application Journey – Create New Illustration

To begin creating a decision in principle, click on ‘New Illustration/DIP’ located on the broker homepage.

The screenshot displays a web application interface with a red header. The navigation menu includes 'Home', 'Existing Member Services', and 'Contact Us'. A search bar is located below the header with the placeholder text 'Search customers, applications, illustrations or decisions' and a 'Search' button. Below the search bar, there are four tabs: 'Illustrations' (with a red badge '1'), 'Decisions In Principle' (with a badge '2'), 'Applications' (with a badge '165'), and 'Pending Switches' (with a badge '0'). A table below the tabs shows a single application record:

Application	Customer	Created Date	Status	Amount	Product	Options
70100490922	Test One	22/04/2025	Converted to DIP	£70,000.00	4.29% 2 year variable discount rate (legals)	Delete

Below the table, there are navigation controls: '<< < Showing 1 of 1 Page(s) > >>' and 'Show: 10'. The 'New Business' section contains two buttons: 'New Illustration/DIP' (with a circuit icon) and 'Submit an Application' (with a 'SUBMIT' button icon). On the right side, there is a 'My Product Switch Documents' section with a table that has no records to display. Below that is a 'News And Notifications' section with a date '8 October 2024 at 04:15 pm' and a large red banner with the text '0% Energy Efficient Additional Borrowing' and a solar panel icon. At the bottom of the banner, there is a small text: 'If your client is a Progressive mortgage customer and they're making home improvements which will reduce the carbon energy used, our 0% Energy Efficient Additional Borrowing may be suitable for them.'

# Full Application Journey – Eligibility

You will be navigated to the first screen of the journey - 'Eligibility'.

Please ensure that your client meets all the criteria presented.

If you are satisfied that your client meets the criteria, tick the checkbox confirming this and choose the application type.

The three application types are:

1. Buying a home;
2. Remortgage; and
3. Self-Build.

Click the Next button to continue

✓ Self-Build

All Mortgage Applications are subject to the Society's Lending Criteria, including income multiples, affordability and credit reference checks. Please note a DIP is not subject to a credit reference check. Each Mortgage Application will be assessed by our Mortgage Underwriting Team.

**Online Criteria**

Online applications must meet the following criteria:

- Mortgaged property must be located in Northern Ireland
- Mortgaged property must be your client's main residence
- Minimum Mortgage Advance of £30,000
- Minimum property value of £75,000
- Applicants must be over 18 years of age
- Maximum 2 applicants
- All income used for affordability or assets used for repayment of the loan must be in sterling

Online applications must not exceed the following Loan to Value (LTV):

- 70% for Apartments (and not over 4 storeys)
- 70% if Lending in Retirement (max age at end of term is 75 for interest only and 80 for a repayment mortgage)
- 75% if Lending into Retirement (max age 75 at end of term)
- 75% for Interest Only or Part Interest Only Mortgages
- 75% for Remortgage with any element of Debt Consolidation
- 80% for Former Local Authority property

What Mortgage Applications are currently unavailable online?

- Northern Ireland Co-Ownership loans
- Guarantor mortgage
- Holiday home mortgage
- Foreign currency mortgage

Please tick the box to confirm that your client meets all the above criteria \*

If your client's Mortgage Application does not meet the above online criteria, contact your local Progressive branch, we are more than happy to talk to you about your client's application. Please refer to the Society's Intermediary website for full details of the [Society's Lending Criteria](#) or contact your local branch by clicking [here](#).

**Application Type**

Please confirm the type of application you are submitting on behalf of your client: \*

Self Build (The site must already be owned outright, and your client(s) must ha... ▼

Is this a First time buyer application?: \*

No ▼

Cancel Save as Draft Next

Step 1 of 6

# Full Application Journey – Level of Service / Client Information

Enter Level of Service information – whether it is Advised or Execution Only, and whether you are charging your client a fee.

Choose whether the application is sole or joint.

Enter applicant 1's personal details. If the application is joint, you will also be asked to enter applicant 2's details.

The screenshot displays a multi-step application process. The current step is 'Level of Service and Client Information', indicated by a red header bar with a '2' and a checkmark icon. The navigation bar shows four steps: Eligibility (checked), Level of Service and Client Information (current), Employment and Income, and Client Information.

**Level of Service**

Level of service provided\*  Are you charging a fee?\*

**Applicants for the mortgage**

Sole or joint application?\*

**Applicant 1**  
Hide Information ▲

**Client Details**

Preferred title\*  First name\*   
Middle names  Surname\*   
Previous names  What gender was your Client assigned at birth?\*   
Marital status\*  Date of birth\*   
Age\*

**Address History**

**Current Address**

House Number  Postcode

Address Line 1\*  Address Line 4   
Address Line 2\*  Address Line 5   
Address Line 3  Postcode\*

For Re-mortgage cases please select 'Owner/Occupier - With Mortgage' for the first applicant and Joint Owner with first Applicant' for subsequent applicants.  
For Joint tenants please select Joint Tenant First Applicant for the first applicant and Joint Tenant with first applicant for the second applicant.

# Full Application Journey – Level of Service / Client Information

Choose the applicant's residential status and landlord information if applicable.

Choose the client's preferred marketing consent and communication method.

Enter your client's contact details (email address and mobile number).

Click Next when complete

### Current Address <sup>i</sup>

House Number	<input type="text" value="33"/>	Postcode	<input type="text" value="bt1 6hh"/>
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Address Line 1*	<input type="text" value="Progressive Bldg Soc"/>	Address Line 4	<input type="text" value="BELFAST"/>
Address Line 2*	<input type="text" value="Progressive House"/>	Address Line 5	<input type="text"/>
Address Line 3	<input type="text" value="33-37 Wellington Place"/>	Postcode*	<input type="text" value="BT1 6HH"/>

For Re-mortgage cases please select 'Owner/Occupier - With Mortgage' for the first applicant and Joint Owner with first Applicant' for subsequent applicants.  
For Joint tenants please select Joint Tenant First Applicant for the first applicant and Joint Tenant with first applicant for the second applicant.

Residential status\* <sup>i</sup>

### Marketing consent

SMS	<input type="checkbox"/>	<small>Progressive Building Society would like to send your client(s) information about products and services which we feel may be of interest to your client(s) by post, telephone, e-mail and text message. This may be through a third party acting on our behalf. How would your client(s) like to receive this information? If your client(s) agree to being contacted for this purpose, please indicate your client(s) agreement to each of these options.</small>
Email	<input type="checkbox"/>	
WhatsApp	<input checked="" type="checkbox"/>	

Please provide a valid email address and telephone number for your client(s):

Email Address* <sup>i</sup>	<input type="text" value="claire@testing.pbsuat.com"/>	Mobile Number*	<input type="text" value="+44"/>	<input type="text" value="7441441997"/>
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# Full Application Journey – Employment and Income

Enter the client's planned retirement age.

Choose the client's employment type and employment basis.

Enter the client's employer details if applicable, including employer name and salary

## New Illustration / Decision in Principle

Home / New Illustration / Decision in Principle

<< ✓ Level of Service and Client Information 3 Employment and Income 4 Client Outgoings 5 >>

### Applicant 1

[Hide Information](#) ▲

#### General Employment Details

Planned retirement age\*

#### Client Employment

Employment type\*  Employment basis\*

#### Employed Income

##### Employer's Details

Client's Employer name\*

[Click here](#) for limits on acceptable income types.

Please provide your client(s) annual income and net monthly income. Their net monthly income can be found on a recent payslip or bank statement.

[Add new income](#)

Type of Income	Gross Annual Income	Net Monthly Income	Options
<input type="text" value="(a) Basic Salary/inc..."/>	<input type="text" value="£50,000.00"/>	<input type="text" value="4850"/>	<a href="#">Remove</a>

[Add](#) [Cancel](#)

[Cancel](#) [Back](#) [Save as Draft](#) [Next](#)

# Full Application Journey – Client Outgoings

Enter an estimate for the client's monthly outgoings – including expenditures such as clothing, transport, gas/electric and childcare

Childcare	<input type="text" value="£0.00"/>	Reset
Alimony / maintenance	<input type="text" value="£0.00"/>	Reset
Cost of repayment strategy (interest only)	<input type="text" value="£0.00"/>	Reset
Cost of other mortgage(s) not to be re-paid	<input type="text" value="£0.00"/>	Reset
Housekeeping/food/washing	<input type="text" value="£0.00"/>	Reset
Gas/electric/oil	<input type="text" value="£0.00"/>	Reset
Rates & ground rent	<input type="text" value="£0.00"/>	Reset
Telephone(s)	<input type="text" value="£0.00"/>	Reset
Building Insurance	<input type="text" value="£0.00"/>	Reset
Service Charge	<input type="text" value="£0.00"/>	Reset
Motoring - petrol, insurance, tax	<input type="text" value="£0.00"/>	Reset
Transport	<input type="text" value="£0.00"/>	Reset
Clothing	<input type="text" value="£0.00"/>	Reset
Household goods (furniture, appliances)	<input type="text" value="£0.00"/>	Reset
Personal goods (toiletries etc)	<input type="text" value="£0.00"/>	Reset
Entertainment/holidays/TV Package	<input type="text" value="£0.00"/>	Reset
Life insurance/pension	<input type="text" value="£100.00"/>	Reset
Other	<input type="text" value="£50.00"/>	Reset

[Reset All Values](#)

### Loans and Credit Cards

Please record information about any credit cards or loans here. For joint loans enter the amount against Applicant 1.

Type	Monthly Repayment	Name of Provider	Outstanding debt	Options
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# Full Application Journey – Product Selection

Confirm the client's property value, loan amount and required term to retrieve products.

Loan to Value (LTV) must be lower than 100%.

Click on 'Find Mortgages' and choose an available product from the search results

<< **Client Outgoings** **5** Product Selection **6** Fees >>

Please confirm your client's property value, loan amount and required term to retrieve products. You can refine your search using the filtering options. If you cannot retrieve products, please ensure that your case is eligible for Online Submission and contact our Online Support Team on 0800 029 4837.

Purchase Price/Property Value: £100,000.00  
Loan Amount: £70,000.00  
Product Type: All Products  
Term: 6-40  
Repayment Type: Capital and Interest  
Your Mortgage: You require a mortgage of £70,000.00  
Your loan to value (LTV) would be 70%

Refine your search  
 2 year  3 year  5 year  
 Variable  Fixed

Amend Search Criteria

All Progressive's mortgage products move onto the Standard Variable Interest Rate (SVR), currently 8.74% (variable), after the initial interest rate period.

**YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE.**

Available Products	Initial Interest Rate	Annual Percentage Rate of Change (APRC)	Early Repayment Charge (ERC)	Fee	Estimated New Monthly Payment
6.74% 3 year variable discount (Self Build) See more ▼	6.74% SVR less 1.25%	8.2%	3%	£1,495.00	£463.80

Cancel Back Save as Draft Next

Step 5 of 6

# Full Application Journey – Fees

Read over the terms of the fees and click the 'Create Illustration' button once satisfied

Home Existing Member Services Contact Us

## New Illustration / Decision in Principle

Home / New Illustration / Decision in Principle

« Client Outgoings Product Selection **6** Fees »

### Fees

Your client(s) may wish to add some of the fee(s) associated with this mortgage application to their loan. If they choose to do this, they will pay interest on the fee(s) until the mortgage is paid off in full, increasing the interest paid overall.

To see the effect of adding fee(s) to your client(s) mortgage, please select 'Add Product Fee' before creating the mortgage illustration.

'Pay Product Fee' is the only option for the valuation fee (where this fee applies) and this must be paid by visiting or phoning a Progressive branch.

If your client chooses to pay their fees up front, they can pay this by phoning or contacting their local Progressive branch.

Fee Description	Amount	Action
Arrangement Fee (£1495)	£1,495.00	Pay Product Fee

Cancel Back Save as Draft Create Illustration

Step 6 of 6

# New Illustration

Here you will be presented with a generated illustration, including an overview of the information about the client, the product selected and application documents.

Click on the 'Convert to DIP' button (top right) to convert the illustration to a decision in principle

Home Existing Member Services Contact Us

### Illustration - 7010049104X

[Convert to Application](#) [Convert to DIP](#) [Delete](#)

Claire Testing Applicant Name	+447441441997 Mobile	claire@testing.pbsuat.com Email	6.74% 3 year variable discount (Self Build) Product
£70,000.00 Loan Amount	28y 0m Term	£213.00 Estimated Monthly Repayment	Submitted Status

---

#### Client Information

##### Main Applicant - Claire Testing

[Hide Information ▲](#)

##### General Information

Title	Dr	Date of Birth	08/08/2000
First Name	Claire	Marital Status	Single
Middle Names		What gender was your Client assigned at birth?	Female
Previous Names		Email	claire@testing.pbsuat.com
Last Name	Testing	Mobile Phone	+447441441997

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##### Address History

###### Current Address ⓘ

Address Line 1	Progressive Bldg Soc	Address Line 4	BELFAST
Address Line 2	Progressive House	Address Line 5	
Address Line 3	33-37 Wellington Place	Postcode	BT1 6HH
Residential status	Living With Friends		

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##### Marketing Consent

SMS

Email

WhatsApp

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##### Employment & Income

#### Application Documents

Date ▼	Type ▼	Options
22/04/2025, 13:04	Mortgage Illustration	Download

<< < Showing 1 of 1 Page(s) > >> Show: 10

#### Product Selection

Product	6.74% 3 year variable discount (Self Build)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	28y 0m
Estimated Monthly Repayment	£463.80		

#### Broker Fee

Level of service provided	Advised
Broker fee amount	£0.00
Sole or joint application?	Sole

# Decision in Principle & Convert to Application

The Decision in Principle has now successfully been generated.

You can then convert to an application, delete the DIP, and view the application documents.

Click on 'Convert to Application' to continue the full application journey.

### Decision in Principle - 7010049104X

[Convert to Application](#) [Delete](#)

Claire Testing Applicant Name	+447441441997 Mobile	claire@testing.pbsuat.com Email	6.74% 3 year variable discount (Self Build) Product
£70,000.00 Loan Amount	28y 0m Term	£213.00 Estimated Monthly Repayment	Submitted Status

---

#### Client Information

##### Main Applicant - Claire Testing

[Hide Information ▲](#)

##### General Information

Title	Dr	Date of Birth	08/08/2000
First Name	Claire	Marital Status	Single
Middle Names		What gender was your Client assigned at birth?	Female
Previous Names		Email	claire@testing.pbsuat.com
Last Name	Testing	Mobile Phone	+447441441997

---

##### Address History

###### Current Address ⓘ

Address Line 1	Progressive Bldg Soc	Address Line 4	BELFAST
Address Line 2	Progressive House	Address Line 5	
Address Line 3	33-37 Wellington Place	Postcode	BT1 6HH
Residential status	Living With Friends		

---

##### Marketing Consent

SMS	<input type="checkbox"/>
Email	<input type="checkbox"/>
WhatsApp	<input checked="" type="checkbox"/>

---

##### Employment & Income

Applicant 1 - Claire Testing

#### Application Documents

Date ▼	Type ▼	Options
22/04/2025, 13:08	Decision In Principle	Download
22/04/2025, 13:04	Mortgage Illustration	Download

« < Showing 1 of 1 Page(s) > » Show: 10

#### Product Selection

Product	6.74% 3 year variable discount (Self Build)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	28y 0m
Estimated Monthly Repayment	£463.80		

#### Broker Fee

Level of service provided	Advised
Broker fee amount	£0.00
Sole or joint application?	Sole

# Submit Application – Client Information

Enter the remaining client details such as NI Number, Country of Residence and Nationality.

There are some additional client detail questions asked that you may also answer (but not required).

## Convert to Application

Home / Convert to Application

<< **1** Level of Service and Client Information **2** Employment and Income **3** Client Outgoings **4** P >>

### Applicants for the mortgage

#### Applicant 1

[Hide Information ▲](#)

#### Client Details

National Insurance Number*	<input type="text" value="JL521488C"/>	Country of Residence*	<input type="text" value="Ireland"/>
Nationality*	<input type="text" value="Irish"/>		

#### Additional Client Details

Do your client(s) own any other property either outright or with a mortgage ?	<input type="text" value="Choose an Option"/>	Please give details here	<input type="text"/>
If your client(s) have existing property, is this property being sold?	<input type="text" value="Choose an Option"/>	If your client(s) are selling an existing property, what is the sale price of this property?	<input type="text"/>
Please confirm if your client(s) have/had any investment or mortgage accounts with the Society	<input type="text" value="Choose an Option"/>	Please give details here	<input type="text"/>

#### Financial Dependants

Please provide the name, date(s) of birth and relationship of all financial dependant(s). To add a new dependant, press the 'Edit' button and input the details of each financial dependant. Once you have finished providing details, add each dependant by using the 'Add' button.

For joint applications, please add all financial dependants under Applicant 1 only.

Please note: Once dependants have been specified and your client(s)' application has been created, it is not possible to update or remove these details without contacting the customer service team

# Submit Application – Client Information

Enter the client's address history (including house number and post code) residential status, date moved into current address and their bank account details

Please note: Once dependants have been specified and your client(s) application has been created, it is not possible to update or remove these details without contacting the customer service team

[Add New](#)

**Other Accounts held with Progressive Building Society**

Do your client(s) hold other Progressive accounts?

**Address History**

**Current Address**

House Number  Postcode

[Search](#)

Address Line 1\*  Address Line 4

Address Line 2\*  Address Line 5

Address Line 3  Postcode\*

For Re-mortgage cases please select 'Owner/Occupier - With Mortgage' for the first applicant and Joint Owner with first Applicant' for subsequent applicants.  
For Joint tenants please select Joint Tenant First Applicant for the first applicant and Joint Tenant with first applicant for the second applicant.

Residential status\*

Date moved into current address\*

✓ You provided at least 3 years of address history

**Bank Account Details**

Please tell us about your client's main bank account.

Sort code\*  Account Number\*

Account holder's name\*  Account held\*  Years  Months

Bank address

[Cancel](#) [Save as Draft](#) [Next](#)

Step 1 of 6

# Submit Application – Employment & Income

Enter more information regarding the client's employer, such as address and whether it is their current or previous employer.

Ensure that you search for the address as the fields are required

### Applicant 1 - Claire Testing

[Hide Information ▲](#)

Where your client's current employment has been for a period of less than 3 years, please provide the details of their previous employment in the 'Additional Information' section at the end of the application.

#### Employed Income

##### Employer's Details

Client's Employer name\*  Current or previous employment\*

##### Employer's Address

House Number  Postcode

Address Line 1\*  Address Line 4

Address Line 2\*  Address Line 5

Address Line 3  Postcode\*

##### Employment Information

Employer's contact telephone number\*  Basis of Employment\*

Employment start date\*  Occupation\*

Occupation Type\*  Job Title\*

##### Employment Duration ⓘ

Years  Months

Type of Income	Gross Annual Income	Net Monthly Income
<input type="text" value="(a) Basic Salary/income"/>	<input type="text" value="£50,000.00"/>	<input type="text" value="£4,850.00"/>

# Submit Application – Property & Valuation

Provide the address of the property to be mortgaged – input the house number and postcode in order to search for the specific property.

Enter property information such as the property description (type of property), the year it was built and the warranty type

## Convert to Application

Home / Convert to Application

<< d ✓ Client Outgoings 4 Property and Valuation 5 Borrowing and Credit History 6 >>

### Property Information

Please confirm the address of the property to be mortgaged

#### Property Address

House Number  Postcode

Address Line 1 *	<input type="text" value="Progressive Bldg Soc"/>	Address Line 4	<input type="text" value="BELFAST"/>
Address Line 2 *	<input type="text" value="Progressive House"/>	Address Line 5	<input type="text"/>
Address Line 3	<input type="text" value="33-37 Wellington Place"/>	Postcode *	<input type="text" value="BT1 6HH"/>
Property description *	<input type="text" value="Detached Bungalow"/>	Year built *	<input type="text" value="2025"/>
Warranty type *	<input type="text" value="Professional Consultant e.g. Arc..."/>	Property purpose *	<input type="text" value="Wholly Owner/Depend. Occupied"/>
New type *	<input type="text" value="Under Construction"/>	Property tenure *	<input type="text" value="Freehold"/>
Number of bedrooms	<input type="text"/>	Number of reception rooms	<input type="text"/>
Number of floors	<input type="text"/>	Garage type	<input type="text" value="Choose an Option"/>
Construction type of walls	<input type="text" value="Choose an Option"/>	Construction type of roof	<input type="text" value="Choose an Option"/>

# Submit Application – Property & Valuation

Enter valuation and viewing arrangement information.

If an estate agent is selling the property, select 'yes' and provide the estate agent's name, contact number and address

Will any business be carried out at the building or any outbuildings?*	No		
Please confirm if the property was built by a Private Sector Builder, Local Authority or Housing Association*	No		
Please confirm if your Client(s) are arranging a loan or receiving assistance towards the balance?*	No		
Please confirm if your Client(s) are receiving a gift from family and friends?*	No		
Please confirm if a Professional Consultant is being used?*	No		
Are drainage, water, gas and electricity connected to the mains?*	Yes		
Will your client(s) own access to the property?*	Yes		

### Valuation and Viewing Arrangements

Valuation required*	Standard	Is an estate agent selling the property?*	No
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### Contact's details ⓘ

Name*	Test	Contact Number*	02890244926
House Number	33	Postcode	bt1 6hh

[Search](#)

Progressive Bldg Soc, Progressive House, 33-37 Wellington Place, BELFA...

Address Line 1*	Progressive Bldg Soc	Address Line 4	BELFAST
Address Line 2*	Progressive House	Address Line 5	
Address Line 3	33-37 Wellington Place	Postcode*	BT1 6HH

Additional Information

### Other Occupiers

Please provide the details of any other persons over 17 years who will be in occupation of the property (other than the applicant). You must provide their name(s), relationship(s) to the applicant and their date(s) of birth.

[Edit](#)

[Cancel](#) [Back](#) [Save as Draft](#) [Next](#)

# Submit Application – Borrowing & Credit History

Enter the questions provided regarding the client's credit history.

If answered 'yes', provide further information where applicable. Input the client's source of deposit and the amount they wish to deposit.

Ensure to click the 'add' button to confirm this. Enter the estimated completion date

## Convert to Application

Home / Convert to Application

<< Outgoings ✓ Property and Valuation 5 Borrowing and Credit History 6 Solicitor and Direct Debit >>

### Applicant 1 - Claire Testing

[Hide Information ▲](#)

#### Credit History

Please confirm the answers to the following credit history questions for your client(s):

Has your client(s) ever,

Been refused a mortgage?\*

Made an arrangement with creditors?\*

Failed to keep up payments on any financial agreement(s)?\*

Had a county court judgement (CCJ) registered against them?\*

Been declared bankrupt?\*

Defaulted on any credit accounts?\*

#### Source of Deposit

Source of deposit\*  Amount\*

Category	Amount	Options
Savings	£30,000.00	Remove

#### Completion Date

Estimated completion date\*

Step 5 of 6

# Submit Application – Solicitor & Direct Debit

Enter the name of the solicitor firm who will be acting for your client, along with their postcode in order to search for the specific firm.

Once found, ensure to click the ‘Select’ button to confirm

You will not be able to submit your client's application without providing solicitor details.

Firm Name  Postcode

**Selected Solicitor**

Contact Name

**Direct Debit Detail**

Your client's monthly mortgage payment will be made by Direct Debit.

Your client's monthly mortgage payment will be made on the 28th of the month. If this date is not suitable for your client, your client can select the 5th or 15th of the month as the collection date.

The first payment will consist of both interest accrued in the month of completion and the first regular payment due.

A Direct Debit Mandate must be completed for each application submitted. The mandate must be signed by the applicant(s)/account holder(s) and must be received by the Society prior to release of an Offer of Advance. The applicant must provide a recent bank statement to verify the details on the Direct Debit Mandate.

A certified copy of the Direct Debit Mandate may be uploaded at submission or you may send the original signed mandate to the Progressive Branch dealing with your application.

Please click [here](#) to access a copy of the Direct Debit Mandate

Is Claire Testing using the account already provided for the direct debit? \*

Sort code \*  Account Number \*

Account Name \*  Preferred Payment Day \*

Step 6 of 6

# Submit Application – Application Created

Here you will be presented with the created application, including an overview of the information about the client, the product selected and application documents.

Click on ‘Submit Application’ (top right) to submit the application.

You may also delete the application by clicking on the ‘delete’ button

## Application - 7010049104X

[Submit Application](#) [Delete](#)

Claire Testing Applicant Name	+447441441997 Mobile	claire@testing.pbsuat.com Email	6.74% 3 year variable discount (Self Build) Product
£70,000.00 Loan Amount	28y 0m Term	£213.00 Estimated Monthly Repayment	Draft Status

### Client Information [Edit](#)

#### Main Applicant - Claire Testing

[Hide Information ▲](#)

##### General Information

Title	Dr	Date of Birth	08/08/2000
First Name	Claire	Marital Status	Single
Middle Names		What gender was your Client assigned at birth?	Female
Previous Names		Email	claire@testing.pbsuat.com
Last Name	Testing	Mobile Phone	+447441441997
		Nationality	Irish
		National Insurance Number	JL521488C

##### Additional Client Details

Do your client(s) own any other property either outright or with a mortgage ?	-	Please give details here	-
If your client(s) have existing property, is this property being sold?	-	If your client(s) are selling an existing property, what is the sale price of this property?	-
Please confirm if your client(s) have/had any investment or mortgage accounts with the Society	-	Please give details here	-

##### Financial Dependents ⓘ

Name	Relationship	Date of birth
------	--------------	---------------

##### Supporting Documents [Upload](#)

Please click [here](#) for supporting documentation requirements.

There are no documents available

##### Application Documents

Date ▼	Type ▼	Options
22/04/2025, 13:08	Decision In Principle	Download
22/04/2025, 13:04	Mortgage Illustration	Download

« < Showing 1 of 1 Page(s) > » Show: 10

##### Product Selection

Product	6.74% 3 year variable discount (Self Build)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	28y 0m
Estimated Monthly Repayment	£463.80		

##### Property & Valuation [Edit](#)

##### Property Information

Address Line 1	Progressive Bldg Soc	Address Line 4	BELFAST
Address Line 2	Progressive House	Address Line 5	

# Submit Application – Application Submission

Before submitting the application, read over the declaration and tick the checkbox to accept in order to proceed.

Choose a security question and answer accordingly.

Click the ‘Submit’ button in order to submit the application.

You may also cancel by clicking the ‘Cancel’ button

Please give details here

discount (Self Build)

Deposit Amount £30,000.00

### Declaration

By reading and accepting the Declaration, you are confirming that your client(s) are fully aware that by processing a mortgage application, Progressive Building Society will search your client(s) credit file and a record of that search will be left (it will leave a hard footprint on the customers records). When your client(s) register online, they will be asked to provide valid photographic identification, to enable us to complete an electronic ID check. It is also your responsibility to ensure that your client(s) understand the Declarations they are making by submitting their Mortgage Application to the Society.

I/we confirm I/we have read and understood the Society's Declaration and the Society's Rule and Mortgage Conditions.\*

### Security Question

Please answer the following question for all applicant(s). We will use this to help verify applicants identify when contacting the Society by phone in connection to this mortgage:

Applicant 1

Security question\*

Place of birth

Applicant's answer\*

Ards

### Submission

Once you are sure all the information is accurate and correct, you can submit your client(s) Mortgage Application. Please note you cannot change any information provided online after submission.

Cancel

Submit

# Submit Application – Application Submitted

The application has now successfully been submitted, including an overview of the information about the client, the product selected and application documents.

You may upload supporting documents if required and view pre-generated application documents.

### Application - 7010049104X

Claire Testing Applicant Name	+447441441997 Mobile	claire@testing.pbsuat.com Email	6.74% 3 year variable discount (Self Build) Product
£70,000.00 Loan Amount	28y 0m Term	£213.00 Estimated Monthly Repayment	Submitted Status

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#### Client Information

##### Main Applicant - Claire Testing

[Hide Information ▲](#)

##### General Information

Title	Dr	Date of Birth	08/08/2000
First Name	Claire	Marital Status	Single
Middle Names		What gender was your Client assigned at birth?	Female
Previous Names		Email	claire@testing.pbsuat.com
Last Name	Testing	Mobile Phone	+447441441997
		Nationality	Irish
		National Insurance Number	JL521488C

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##### Additional Client Details

Do your client(s) own any other property either outright or with a mortgage ?	-	Please give details here	-
If your client(s) have existing property, is this property being sold?	-	If your client(s) are selling an existing property, what is the sale price of this property?	-
Please confirm if your client(s) have/had any investment or mortgage accounts with the Society	-	Please give details here	-

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##### Financial Dependents ⓘ

Name	Relationship	Date of birth
There are no records to display		

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#### Supporting Documents

Please click [here](#) for supporting documentation requirements. Upload

There are no documents available

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#### Application Documents

Date ▼	Type ▼	Options
22/04/2025, 13:19	Mortgage Illustration	Download
22/04/2025, 13:04	Mortgage Illustration	Download
22/04/2025, 13:19	Direct Debit Mandate	Download
22/04/2025, 13:19	Mortgage Conditions 2019	Download
22/04/2025, 13:19	Tariff Of Charges	Download
22/04/2025, 13:19	Mortgage App Remaining Section	Download
22/04/2025, 13:19	Mortgage App Section B	Download
22/04/2025, 13:19	Mortgage App Section A	Download
22/04/2025, 13:08	Decision In Principle	Download

« < Showing 1 of 1 Page(s) > » Show: 25

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#### Product Selection

Product	6.74% 3 year variable discount (Self Build)	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	28y 0m
Estimated Monthly	£463.80		

# Submit Application – Your Clients Offer

When your client's online application has been fully underwritten and offered, you will receive an email notification advising that a new documents titled 'Offer Of Advance' is available to view.

These can be viewed in the Application Documents section. Click the action button located to the right of the documents (circled) to download as PDF

Where an amended offer or an offer extension is required and we begin to process this, you will receive notifications which appear to show that the case has been resubmitted. This is normal and is a result of us reviewing the application