

How to obtain a KFI

When you first log on you will be presented with this screen to obtain a KFI without completing a full mortgage application click on optional KFI

Leeds Building Society Savings | Mortgages | Credit Card | Insurance | Financial Planning | Other Services

About our Online Services

- Log Out
- **Introducer Menu**
- Optional KFI

Introducer Menu

Online Tools

Welcome to the Leeds Building Society online service for Mortgage Introducers

Support information and contact details for this website can be found at our [main introducer site](#)

Easy To Use Calculators

Quick estimate of how much an applicant(s) can borrow - [Borrowing Calculator](#)

Quick idea of how much a mortgage will cost - [Cost Calculator](#)

Create a New Application

Prior to starting a new DIP/application please select the lending partner linked to this application:

Please select ...

Process a New DIP or Application

Cases

You will now see this screen so choose your lending partner out of the drop down box:

Leeds Building Society Savings | Mortgages | Credit Card | Insurance | Financial Planning | Other Services

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- Introducer Menu
- **Optional KFI**

Optional Key Facts Illustration Menu

Create a New KFI

Prior to starting a new KFI please select the Business Name linked to this application:

Please select ...

Process A New KFI

Key Facts Illustrations

Then choose Process a new KFI and you will be taken to the below screen:

Personal details

Applicant 1

* Title

* Initial(s)

* Surname

* Are you a first time buyer? Yes No

Applicant 2

* Title

* Initial(s)

* Surname

* Are you a first time buyer? Yes No

Mortgage details

* What is the purpose of the loan?

* How much would you like to borrow? £

* What is the purchase price / value of the house you wish to buy? Click Here for [Shared Ownership](#) mortgages, Click Here for [Right to Buy](#) mortgages. £

* Estimated property market value (Shared Ownership or Right to Buy mortgages)? £

* Over what period would you like to repay the loan? years months

* Do you require Leeds Building Society to instruct the valuation?
Please note: that if you choose to arrange your own valuation it may not be acceptable by the Society, and could cause a delay in the Society being able to provide you with a mortgage offer. Yes No

What type of valuation do you require? If Leeds Building Society are to instruct the valuation, what type of valuation do you require? Please note that for a Re-Mortgage application, you should select a Mortgage Valuation only.

Products

* Choose which mortgage product you would like:

Click on **Get Products** to show available products.

If you want to borrow against one part (e.g. Capital and Interest) then please enter the full amount in there and leave the other box blank.

Capital & interest £ Interest only £

Fill in the appropriate fields in the top two sections and then press, Get products. The screen will then automatically reload and you will be able to choose your product out of the drop down box and fill in the appropriate box below.

Products

* Choose which mortgage product you would like:

Click on **Get Products** to show available products.

If you want to borrow against one part (e.g. Capital and Interest) then please enter the full amount in there and leave the other box blank.

Capital & interest £ Interest only £

Click continue and you will be taken to this screen:

Key Facts Illustration

We need all the information marked with an asterisk (*) to process your application.

Arrangement Fees

If you are charging a fee to your client for arranging this mortgage, enter the amount here*

£

If part of your fee is refundable if the mortgage application does not proceed, enter the refundable amount here*

£

If you are charging a fee to your client because conditional insurance is not arranged through you, enter the amount here*

£

Arrangement Details

Is this sale an advised sale within FSA rules?*

Yes No

Will the application be processed online?*

Yes No

Cancel

Continue

Again fill in the appropriate questions and press Continue.
You will then be given a screen like the one below asking how you would like the fees to be paid:

Mortgage Application - Fees Applicable

We need all the information marked with an asterisk (*) to process your application.

Any fees that you choose to add to your loan will result in increased monthly payments. This will be reflected within the monthly payments quoted in your Key facts Illustration and any Mortgage Offer that is made.

Any fees that you choose not to add to your loan will be debited from your account on completion, unless you pay them separately prior to completion. Any fees that are debited will result in your monthly payments being increased at the first payment review, to reflect payment of the fees and any interest charged on them.

Fees which you may choose to add to your loan

| | Amount Payable by Leeds Building Society | Amount Payable By You | Add This Fee To Mortgage?* |
|--------------------------------------|--|--------------------------------------|--|
| Electronic Transfer Fee | <input type="text" value="£ 0.00"/> | <input type="text" value="£35.00"/> | <input type="radio"/> Yes <input type="radio"/> No |
| Product Arrangement Fee - Completion | <input type="text" value="£ 0.00"/> | <input type="text" value="£400.00"/> | <input type="radio"/> Yes <input type="radio"/> No |

Fees which must be paid up front

| | Amount Payable by Leeds Building Society | Amount Payable By You |
|---------------------------------------|--|--------------------------------------|
| Broker Fee | <input type="text" value="£ 0.00"/> | <input type="text" value="£200.00"/> |
| Product Arrangement Fee - Application | <input type="text" value="£ 0.00"/> | <input type="text" value="£199.00"/> |

Fees to be paid by Leeds Building Society

| | Amount Payable by Leeds Building Society |
|---------------------------------|--|
| Standard Mortgage Valuation Fee | <input type="text" value="£ 335.00"/> |

Cancel

Continue

Answer the questions yes or no and then press Continue to create your Key facts illustration.

Key Facts Illustration

Now choose your next option

Your key facts illustration has been generated. Now please choose from the options below.

If you would like to go back to change something e.g your loan amount, or choose a different product click here.

Edit

Please click here to open your key facts illustration document in pdf format - **you can print the KFI from here.**

View

Please note, you'll need to have Acrobat Reader (version 4 or higher) installed to print locally. If you haven't already got this free software and you'd like to install it, please visit the [Adobe web site](#).

You want to start another fresh key facts illustration.

New

You want to start your mortgage application straight away. Click here to get a Decision in Principle (DIP).

Proceed

You have completed the key facts illustration. Click here to return to where you came from.

Exit

On this screen your KFI has been created and you have a few options from here you can either edit the KFI, View and print it or you can convert it into a decision in principle using the options on the left hand side of the screen.