

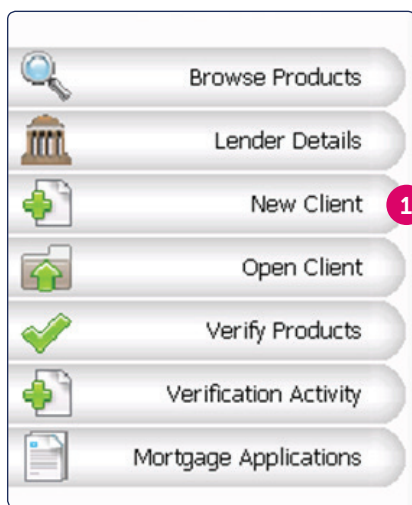
How to find Precise Mortgages' products on IRESS Trigold Prospector

THIS INFORMATION IS FOR THE USE OF MORTGAGE INTERMEDIARIES AND OTHER PROFESSIONALS ONLY

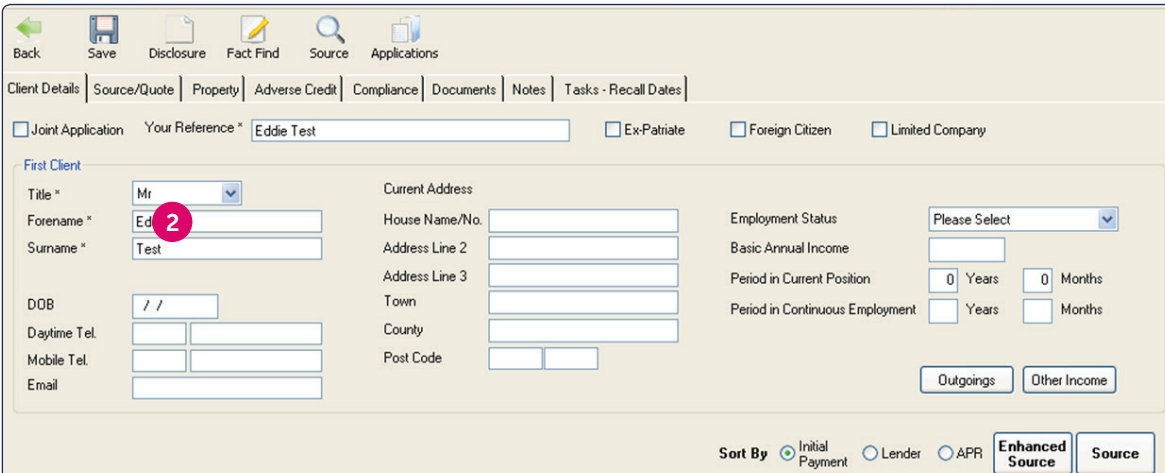
Please note that this is not an official document from IRESS Trigold and should be used as a guide to help you find products but not to be relied upon.

If you are struggling to find Precise Mortgages' products then you may have a filter or Precise Mortgages may not be selected on your panel of lenders. The below is a brief explanation of setting up a new client with no filters to ensure that you can source all of our products:

- 1 Start at the main home screen and select 'New Client':



- 2 Once this opens you will need to complete the 'Client Details' tab, you will only need to fill in the fields marked with a *



Back Save Disclosure Fact Find Source Applications

Client Details | Source/Quote | Property | Adverse Credit | Compliance | Documents | Notes | Tasks - Recall Dates

Joint Application Your Reference * Ex-Patriate Foreign Citizen Limited Company

First Client

Title * Current Address

Forename * House Name/No.

Surname * Address Line 2

DOB Address Line 3

Daytime Tel. Town

Mobile Tel. County

Email Post Code

Employment Status

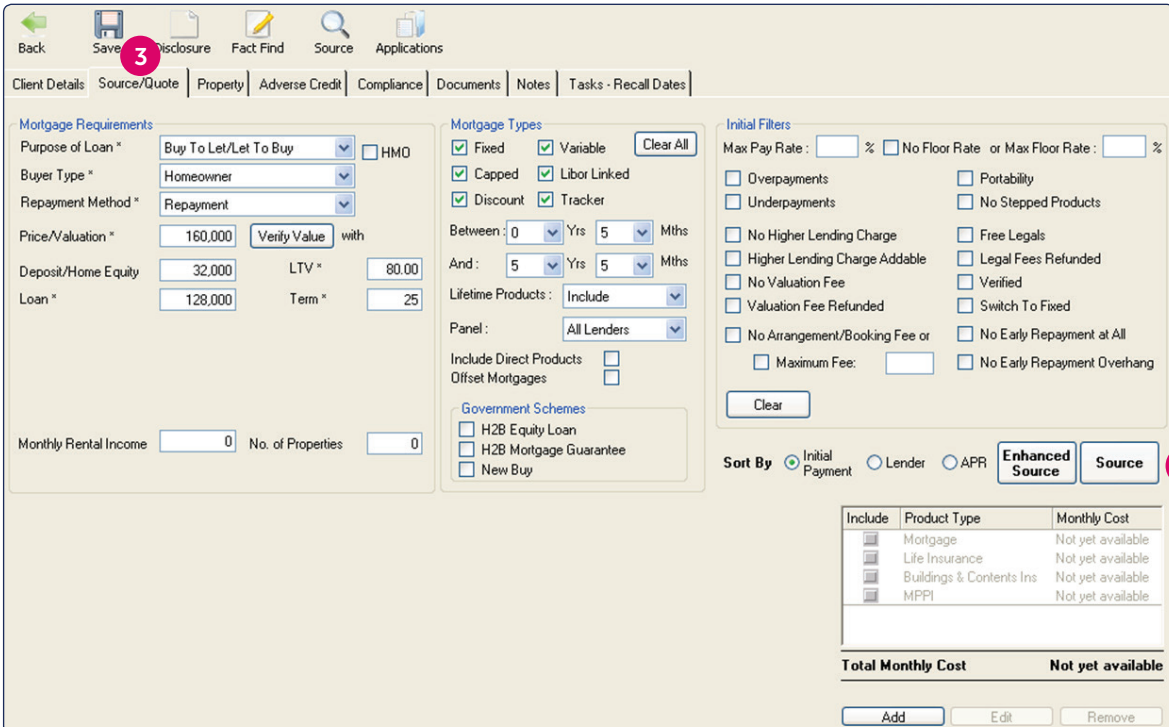
Basic Annual Income

Period in Current Position Years Months

Period in Continuous Employment Years Months

Sort By Initial Payment Lender APR

3 Next, go to the second tab called 'Source/Quote', here you will need to select the fields to show the products you require, below are two examples, one for buy to let mortgages and another for residential mortgages:



Mortgage Requirements

Purpose of Loan * Buy To Let/Let To Buy HMD
 Buyer Type * Homeowner
 Repayment Method * Repayment
 Price/Valuation * 160,000 with
 Deposit/Home Equity 32,000 LTV * 80.00
 Loan * 128,000 Term * 25
 Monthly Rental Income 0 No. of Properties 0

Mortgage Types

Fixed Variable
 Capped Labor Linked
 Discount Tracker
 Between: 0 Yrs 5 Mths
 And: 5 Yrs 5 Mths
 Lifetime Products: Include
 Panel: All Lenders
 Include Direct Products
 Offset Mortgages
Government Schemes
 H2B Equity Loan
 H2B Mortgage Guarantee
 New Buy

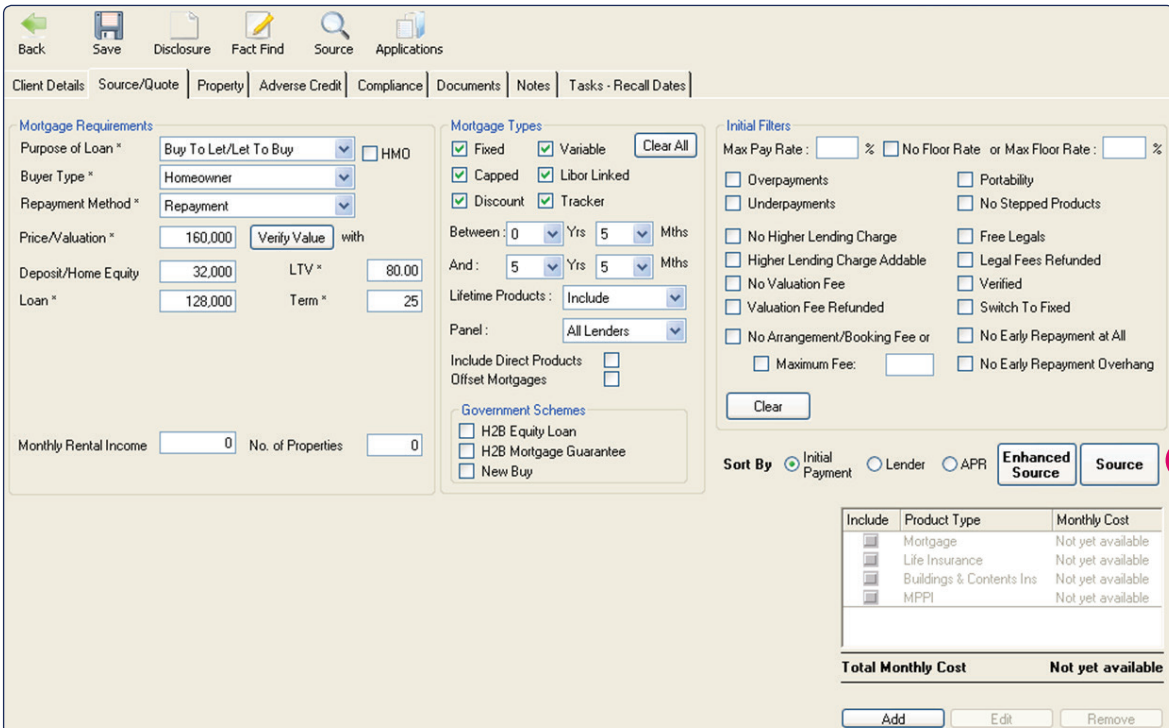
Initial Filters

Max Pay Rate: % No Floor Rate or Max Floor Rate: %
 Overpayments Portability
 Underpayments No Stepped Products
 No Higher Lending Charge Free Legals
 Higher Lending Charge Addable Legal Fees Refunded
 No Valuation Fee Verified
 Valuation Fee Refunded Switch To Fixed
 No Arrangement/Booking Fee or No Early Repayment at All
 Maximum Fee: No Early Repayment Overhang

Sort By Initial Payment Lender APR

Include	Product Type	Monthly Cost
<input type="checkbox"/>	Mortgage	Not yet available
<input type="checkbox"/>	Life Insurance	Not yet available
<input type="checkbox"/>	Buildings & Contents Ins	Not yet available
<input type="checkbox"/>	MPP1	Not yet available

Total Monthly Cost Not yet available



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 Panel: All Lenders
 Include Direct Products
 Offset Mortgages
Government Schemes
 H2B Equity Loan
 H2B Mortgage Guarantee
 New Buy

Initial Filters

Max Pay Rate: % No Floor Rate or Max Floor Rate: %
 Overpayments Portability
 Underpayments No Stepped Products
 No Higher Lending Charge Free Legals
 Higher Lending Charge Addable Legal Fees Refunded
 No Valuation Fee Verified
 Valuation Fee Refunded Switch To Fixed
 No Arrangement/Booking Fee or No Early Repayment at All
 Maximum Fee: No Early Repayment Overhang

Sort By Initial Payment Lender APR

Include	Product Type	Monthly Cost
<input type="checkbox"/>	Mortgage	Not yet available
<input type="checkbox"/>	Life Insurance	Not yet available
<input type="checkbox"/>	Buildings & Contents Ins	Not yet available
<input type="checkbox"/>	MPP1	Not yet available

Total Monthly Cost Not yet available

Please note, all of the other tabs should be left clear and this will bring back all products that are available for the information provided.

4 Once you have the above information completed, click 'Source' and this will bring back a list of products, this can then be sorted by initial rate or by lenders.

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- 5 Points to note that may be the reason why you can't see our products are:
- a. The information that you have input at point 3 may not fit our products
 - b. There has been adverse added to the 'Adverse Credit' tab for the client that you are using that does not fit our profile
 - c. You may not have us on you panel list on the 'Source/Quote' tab
 - d. Please make sure that you have 'LIBOR linked' selected to be able to see our tracker products
- 6 If you are still unable to find our products then please contact us, including as much detail as possible and also contact IRESS Trigold direct on 0845 068 3000 as they will be able to help you with any problems with the unique system that is designed for your company.

We can provide literature in large print, Braille and audio tape. Please ask us for this leaflet in an alternative format if you need it.

Precise Mortgages is a trading name of Charter Court Financial Services Limited which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register Firm Reference Number 494549). Registered in England and Wales with company number 06749498. Registered office: 2 Charter Court, Broadlands, Wolverhampton WV10 6TD.