

Loans & Credit cards

Applicant 1/2	Lender	Original Amount	Start Date	Current Balance	end date	Monthly Payment	Repay on Completion	Purpose
		£		£		£	Y/N	
		£		£		£	Y/N	
		£		£		£	Y/N	
		£		£		£	Y/N	
		£		£		£	Y/N	
		£		£		£	Y/N	
		£		£		£	Y/N	

Assets

	First Applicant	Second Applicant
Cash Reserves	£	£
Investment(Shares etc)	£	£
Other	£	£

Existing Mortgage Details

Lender	Property Value	Current Balance	Remaining yrs	Monthly Payment	Interest Rate	Repayment type	end date of ERP	Rental if let
	£	£		£	%			
	£	£		£	%			
	£	£		£	%			
	£	£		£	%			
	£	£		£	%			
	£	£		£	%			

Existing Protection

Applicant 1/2	Company	Life Cover	Critical ill	Premium	Term/WOL	Start Date
		£	£	£		
		£	£	£		
		£	£	£		
		Applicant 1		Applicant 2		
Do you have a will		Y/N		Y/N		
Last reviewed						

Bank Details

Name of Bank		Time with Bank	
Address			
Account number			
Sort Code			
Name on Account			

New Mortgage Requirements

Buyer Type		Purpose of loan	
Property to be Mortgaged:			
Address.			
Purchase price/ Value	£		
Loan required	£		
Amount of additional borrowing	£		
Purpose of any increased borrowing			
<p>If consolidating existing financial commitments, you should be aware that whilst this may mean that you will make short-term savings, over the long term you might end up payinh more. This is because you may be extending the period of the loan. You are also transferring previously unsecured debts to a</p>			
Mortgage term Required			
Are you borrowing more than the purchase price		Y/N	
if yes give details			
Any further relevant information.			
do you have a deposit available	Y/N	Amount.	£
is vendor/builder paying the deposit	Y/N		
if no, source of deposit			
Projected Rental Income	pw/pcm		
Property Details			
Property Type	House/ Flat/ Maisonette/ Bungalow		
	Detached/ Semi-detached/ Terraced		
	garage	Y/N	Parking onsite/ off-site
Over or adjacent to retail premises	Y/N		
If flat or Maisonette:	# of flats in block		How many storeys
	Converted/ Purpose built/ studio/ Maisonette		
	Lift Served	Y/N	
	Deck Accessed	Y/N	
	Ex-local Authority	Y/N	
Tenure	Leasehold/ freehold/ feudal/ share of freehold		
Leasehold/ SOF	Remaining Lease		Ground rent
Accomodation	Living rooms		Bedrooms
	Bathrooms	Toilets	Kitchens
	Outbuildings		
	Other		
Construction type	Walls:	Stone/ brick/ Timberframe/ other	
	Roof:	Slate/ tile/ other	
		Flat/ pitched/ other	

