

Enquiry Form. Private & Confidential

Personal Details	Applicant 1	Applicant 2
Title		
Surname		
Previous/Maiden Name		
First Name		
Date of Birth	age next	age next
Marital Status		
Sex		
Smoker	Y/N	Y/N
Relationship to other applicant		
# of dependents		
Current Address		
Post Code		
Date moved in		
Owner/ rented		
On electoral role	Y/N	Y/N
if less than 3 years, past address(s)		
Date moved in		
Telephone H:		
Telephone W:		
Telephone M:		
e-mail Address		
Employment		
Occupation		
time with current employer		
employment status		
probation period	Y/N	Y/N
Employers name		
Employers Address		
Post code		
Anticipated retirement age		
Previous Occupation if less than 1 yr		
Previous employment start date		
Previous income	£	£

Income			
Employed clients			
Basic annual income	£		£
Guaranteed Overtime	£		£
Regular Overtime	£		£
Guaranteed Bonus	£		£
Regular Bonus	£		£
Self-employed			
Number of years in Business			
Last 3yrs(pre-tax) Profit	£	Yr end	£ Yr end
	£	Yr end	£ Yr end
	£	Yr end	£ Yr end
Are Accounts available		Y/N	Y/N
How many years			
Any other Income			
Net Other Income			
Other irregular income			
Investment income			
Mortgage Subsidy			
Maintenance Payments			

Affordability Calculator	Applicant 1	Applicant 2
Net reg. monthly income	£	£
Other reg. monthly income	£	£
Total net monthly income	£	£
Ongoing mortgage payments/rent	£	£
Food	£	£
Utilities	£	£
Transport	£	£
Social	£	£
Loan/ credit card payments	£	£
Savings & investments	£	£
Other	£	£
Total Monthly Expenditure	£	£
Total monthly disposable income	£	£

What monthly budget do you have available for your new purchase | £

Credit History			
Have you ever been insolvent, bankrupt, sequestered, made arrangements with your creditors or been			
	Applicant 1	Applicant 2	
CCJ	Y/N	Y/N	Y/N
Bankruptcy/insolvency	Y/N	Y/N	Y/N
Credit Defaults	Y/N	Y/N	Y/N

if yes to any of the above please give details on additional information page.

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	

