|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date** |  |  | **Fee** | **Initial** | **£** |
| **Adviser** |  | **Referrer** |  | **Completion** | **£** |
|  |
| **Mortgage Type** | Purchase | [ ]  | Remortgage | [ ]  | Holiday Home | [ ]  |
| Residential | [ ]  | BTL | [ ]  | Commercial | [ ]  |

**Personal Details**

|  |  |  |
| --- | --- | --- |
|  | **Client 1** | **Client 2** |
| **Title and Forename(s)** |  |  |
| **Surname** |  |  |
| **Date of Birth** |  |  |
|  **Tick this box if address is the same for Client 2** [ ]  |
| **Address** |  |  |
|  |  |
|  |  |
| **Postcode** |  |  |
| **Date Moved In** |  |  |
| **Renting** | Yes | [ ]  | No | [ ]  | Yes | [ ]  | No | [ ]  |
| **Rent (If Renting)** | **£** | **£** |
|  |
| **On Electoral Roll** | Yes | [ ]  | No | [ ]  | Yes | [ ]  | No | [ ]  |
|  |
| **Status** | Single | [ ]  | Widowed | [ ]  | Single | [ ]  | Widowed | [ ]  |
| Married | [ ]  | Other | [ ]  | Married | [ ]  | Other | [ ]  |
| Divorced | [ ]  | If Other \_\_\_\_\_\_\_\_\_\_\_\_ | Divorced | [ ]  | If Other \_\_\_\_\_\_\_\_\_\_\_\_ |
|  |
| **Contact** | **Home** |  |  |
| **Mobile** |  |  |
| **Email** |  |  |
|  |
| **Dependants** | **Name** |  | **Age** |  | **Name** |  | **Age** |  |
| **Name** |  | **Age** |  | **Name** |  | **Age** |  |
|  |
| **Employment** | Employed | [ ]  | Sole Trader | [ ]  | Employed | [ ]  | Sole Trader | [ ]  |
| Self-Employed | [ ]  | Unemployed / Retired | [ ]  | Self-Employed | [ ]  | Unemployed / Retired | [ ]  |
| Limited Company | [ ]  | Limited Company | [ ]  |
| **Contract** | Full Time | [ ]  | Probationary | [ ]  | Full Time | [ ]  | Probationary | [ ]  |
| Part Time | [ ]  | Part Time | [ ]  |
| **Occupation** |  |  |
| **Time Employed** |  | **Years** |  | **Months** |  | **Years** |  | **Months** |
| **Contract Type** | Permanent | [ ]  | Contract | [ ]  | Permanent | [ ]  | Contract | [ ]  |
| Temporary | [ ]  | Zero Hours | [ ]  | Temporary | [ ]  | Zero Hours | [ ]  |
| **Income (Basic PA)** | **£** | **£** |
| **Overtime** | **£** | Weekly | [ ]  | Monthly | [ ]  | **£** | Weekly | [ ]  | Monthly | [ ]  |
| **Bonus** | **£** | **M** | [ ]  | **Q** | [ ]  | **A** | [ ]  | **£** | **M** | [ ]  | **Q** | [ ]  | **A** | [ ]  |
| **S/E Income** **(last 2 years)** | **£** | **Year** |  | **£** | **Year** |  |
| **£** | **Year** |  | **£** | **Year** |  |
|  |

**Other Income**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Child Tax** | **£** | **Working Tax** | **£** | **Child Benefit** | **£** | **Maintenance** | **£** |

**Loan Details**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **FTB** | Yes | [ ]  | No | [ ]  | Yes | [ ]  | No | [ ]  |
| **Help to Buy** | Yes | [ ]  | No | [ ]  |  |
| **New Build** | Yes | [ ]  | No | [ ]  | **Year Built** |  |
|  |
| **Existing Lender** |  | **Existing Mortgage** | **£** |
|  | **Any ERC** | Yes | [ ]  | No | [ ]  |
|  |
| **Purchase Price/Value** | **£** | **Loan Required** | **£** | **Years** |  |
| **Additional Borrowing** | **£** | **Reason** |  |
| **Expected Monthly Rental (If BTL)** | **£** |  |
|  |
| **Tenure** | Freehold | [ ]  |  |
| Leasehold | [ ]  | **Years Left on Lease** |  |  |
| **Ground Rent** | **£** | **Service Charge** | **£** |
|  |
| **Method of Payment** | **Capital & Interest** | **£** |  |
| **Interest Only** | **£** |
|  |
| **Type of Loan** | **Fixed** | **2 year** | [ ]  | **3 year** | [ ]  | **5 year** | [ ]  |
| **Tracker** | **2 year** | [ ]  | **3 year** | [ ]  | **5 year** | [ ]  |
|  |
| **Number of BTLs** |  |  | **Monthly Rental Income** | **£** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Whose** | **Monthly Payment** | **Outstanding Balance** | **Term Remaining** | **To be Repaid** |
| **Loans/HP** | **1** | **C1** | [ ]  | **C2** | [ ]  | **£** | **£** |  | **Yes** | [ ]  | **No** | [ ]  |
| **2** | **C1** | [ ]  | **C2** | [ ]  | **£** | **£** |  | **Yes** | [ ]  | **No** | [ ]  |
| **3** | **C1** | [ ]  | **C2** | [ ]  | **£** | **£** |  | **Yes** | [ ]  | **No** | [ ]  |
| **Credit Cards** | **1** | **C1** | [ ]  | **C2** | [ ]  | **£** | **£** |  | **Yes** | [ ]  | **No** | [ ]  |
| **2** | **C1** | [ ]  | **C2** | [ ]  | **£** | **£** |  | **Yes** | [ ]  | **No** | [ ]  |
| **3** | **C1** | [ ]  | **C2** | [ ]  | **£** | **£** |  | **Yes** | [ ]  | **No** | [ ]  |
| **Maintenance** | **C1** | [ ]  | **C2** | [ ]  | **£** |  |
| **C1** | [ ]  | **C2** | [ ]  | **£** |  |
| **Childcare/School** |  | **£** |  |
| **Other Expenditure** |  | **£** |  |
|  |
| **Pension Contribution** | **Client 1** | **£** |  | **Deducted from Pay** | Yes | [ ]  | No | [ ]  |  |
| **Client 2** | **£** | Yes | [ ]  | No | [ ]  |
|  |
| **Arrears** | **Client 1** | Yes | [ ]  | No | [ ]  |  | **Amount** | **£** |  | **Months** |  |
| **Client 2** | Yes | [ ]  | No | [ ]  | **£** |  |
|  |
| **CCJs / Lates / Defaults** | **Client 1** | Yes | [ ]  | No | [ ]  |  | **Satisfied** | Yes | [ ]  | No | [ ]  |  | **Date** |  |
| **Client 2** | Yes | [ ]  | No | [ ]  | Yes | [ ]  | No | [ ]  |  |
|  |
| **Notes** |  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

**Commitments**