|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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**