



Contact details ( continued)	First Applicant	Second Applicant
Previous addresses ( If les than 3 years at current address) If more than one address, please list others in Notes section		
Owner/Tenant/Living with parents/Friends		
Dates		
If currently renting: name and contact details of current landlord		

Current Employment and Income	First Applicant	Second Applicant
Employed or self-employed (Permanent/contract/probation)		
Job title		
Name and address of employer or business		
Start date		
National Insurance No.		

Income	First Applicant	Second Applicant
Basic annual salary		
Overtime		
Bonuses		
Commission		
Additional income/allowances		
Dividends		
Payslip deductions		
Net monthly income		

<p><b>Notes</b></p>
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<b>Income</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Shareholding		
Net profit last year 20 _ _		
Net profit previous year 20 _ _		
Net profit year before 20 _ _		
Accountants name and contact details		

<b>Current Mortgage Details</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Lender		
Mortgage account number		
Current monthly mortgage payment		
Property value		
Outstanding mortgage amount		
Repayment term of mortgage		
Rate type		
Early repayment charge		

<b>Any other Mortgages Held</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Current lender		
Mortgage account number		
Current monthly mortgage payment		
Property value		
Outstanding mortgage amount		
Repayment or interest only		
Remaining term of mortgage		
Address of property		
Rent received per month		

<b>Notes</b>
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<b>New Mortgage Details</b>	<b>First Applicant</b>	<b>Second Applicant</b>
New property purchase price (or value for remortgage)		
Deposit/Equity available		
Mortgage amount required		
Budget for monthly payments		

**Commitments**

Which bank do you use?

**Loans/Credit Cards/Car Finance**

First or Second Applicant	Lender	Type	Start Date	End Date	Current balance	Monthly payments	Repay before mortgage starts?

**Other Committed Expenditure**

First or Second Applicant	Type	Monthly cost	Years remaining

**Credit History**

	Yes/No	Details
Mortgage or loan refused?		
Judgement for debt/default registered?		
Declared bankrupt?		
Missed payments on credit commitments?		

**Notes**

**Details of Assets Held - Savings**

Asset Type	Value	Details

**Details of Existing Insurance Policies**

Type	Insurer	Policy Number	Owner	Sum Assured	Premium

**Details of Pension Plans**

Type	Insurer/Provider	Policy number	Owner	Anticipated income in retirement	Premium

**Notes**



Current Bank Details	
Bank name	
Account number	
Sort Code	
How long account held	

Estate Agent Details	
Company name	
Address	
Telephone number	
Email	
Contact Name	

Solicitor Details	
Company name	
Address	
Telephone number	
Email	
Contact Name	

Notes