Date

## PART 1

| Personal Details | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| Title | - | - |
| Surname |  |  |
| First name |  |  |
| Middle Name | - |  |
| Gender |  | - |
| Previous name and date changed <br> (if applicable or married) |  |  |
| Marital status |  |  |
| Date of birth |  |  |
| Nationality <br> If non EU, permanent right to reside in the UK? |  |  |
| Have you smoked in the last 12 months? |  |  |
| Dependents (names and date of birth) |  |  |
|  |  |  |
|  |  |  |


| Contact Details | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| Telephone: Home/Work |  |  |
| Mobile |  |  |
| Personal email address |  |  |
| Current address |  |  |
| Owner/Tenant/Living with parents/ <br> friends |  |  |
| Date moved to current address |  |  |

## Notes

| Contact details ( continued) | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| Previous addresses <br> (If les than 3 years at current address If more than one <br> address, please list others in Notes section |  |  |
| Owner/Tenant/Living with <br> 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 <br> (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 |  |  |

## Notes

| Income | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| Shareholding |  |  |
| Net profit last year $20 \_\ldots$ |  |  |
| Net profit previous year $20 \_\ldots$ |  |  |
| Net profit year before $20 \ldots \ldots$ |  |  |
| Accountants name and contact details |  |  |


| Current Mortgage Details | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| Lender |  |  |
| Mortgage account number |  |  |
| Current monthly mortgage payment |  |  |
| Property value |  |  |
| Outstanding mortgage amount |  |  |
| Repayment term of mortgage |  |  |
| Rate type |  |  |
| Early repayment charge |  |  |


| Any other Mortgages Held | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| 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 |  |  |

## Notes

| New Mortgage Details | First Applicant | Second Applicant |
| :--- | :--- | :--- |
| 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 <br> Applicant | Lender | Type | Start Date | End Date | Current balance | Monthly <br> payments | Repay before <br> 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 <br> retirement | Premium |
| :--- | :--- | :--- | :--- | :--- | :--- |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Notes

$\square$
PART 2

| Full Name (s) |  |
| :--- | :--- |
|  |  |
| New Property Details |  |
| Address |  |
| Property type |  |
| Terraced/Semi-detached/Detached or Flat |  |
| Property construction Type |  |
| If flat: |  |
| Purpose built/conversion |  |
| Unexpired years on lease? |  |
| Which floor and no. of floors in building? |  |
| Service Charge / Ground Rent? | pa / £ |
| No. of bedrooms |  |
| No. of living rooms |  |
| No. of bathrooms |  |
| Garage/parking |  |
| Year property built |  |


| Additional Details | First Applicant | Second Applicant |
| :--- | :--- | :---: |
| Any health issues? |  |  |
| Anticipated retirement age |  |  |
| Do you have an up-to-date will? |  |  |

## 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

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