FACT FIND



Date

PART 1

Personal Details	First Applicant	Second Applicant
Title		
Surname		
First name		
Middle Name		
Gender		
Previous name and date changed (if applicable or married)		
Marital status		
Date of birth		
Nationality 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/ friends		
Date moved to current address		

Notes

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		

Income	First Applicant	Second Applicant
Shareholding		
Net profit last year 20		
Net profit previous year 20 $_$ $_$		
Net profit year before 20		
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		

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		

Commitmer	nts						
Which bank	do you use'	?					
Loans/Cred	lit Cards/C	ar Finance					
First or Second Applicant	Lender	Туре	Start Date	End Date	Current balance	Monthly payments	Repay before mortgage starts?

Other Committed Expenditure			
First or Second Applicant	Туре	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					
Туре	Insurer	Policy Number	Owner	Sum Assured	Premium

Details of Pension Plans					
Туре	Insurer/Provider	Policy number		Anticipated income in retirement	Premium

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FACT FIND



Date

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 / £	ра
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	

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