

## INITIAL ENQUIRY FORM- PURCHASE

INFORMATION COLLECTED AND PROTECTED UNDER THE DATA PROTECTION ACT

#### **General Information**

	Client 1	Client 2
Title		
Forename		
Middle name		
Surname		
Marital Status		
Previous Name/Maiden Name		
Date change of name		
D.O.B		
NI number		
Nationality		
Contact number		
Contact email address		
Residental Status		
Address History (up to three year	s of address history needed)	
Current address		
Post code		
Date moved in		
Previous Address		
Post code		
Date moved in / Date moved out		
Employment	(Employed) (Self Employed)	(Employed) (Self Employed)
Occupation		
Contract		
Name of company		
Start date		
Gross Salary	£	£
Additional Income	£	£
Work Address		
Post code		



# SIMplifying FINance!

## **Your Objectives** What can I help you with (First Time Buyers) (Buy a new property) (BTL) (Protection) (Other) If Other please explain Use for the property (Main Residence) (BTL) (Business) (other) If Other please explain What is the most important thing (Cost of Monthly repayments) (Term Of the mortgage) about your mortgage and why? (Overall costs) (stability of monthly payments) Please explain **Purchase Price** How much would you like to £ borrow Deposit £ Source of deposit Any additional savings (Yes) (No) (Yes) (No) Prefered Term Of Mortgage Planned Retirment Age Are you happy for your mortgage to go in to your retirement (Yes) (No) Are you aware of any future changes to your circumstances (Yes) (No) <u>If yes Please explain</u> **Credit History**

ivilssed iviortgage payment	(Yes)	(NO)	(Yes)	(NO)
Missed Loans	(Yes)	(No)	(Yes)	(No)
CCJS	(Yes)	(No)	(Yes)	(No)
IVA	(Yes)	(No)	(Yes)	(No)
Defaults	(Yes)	(No)	(Yes)	(No)
Bankruptcy	(Yes)	(No)	(Yes)	(No)
Criminal Record Have you ever been Declined any	(Yes)	(No)	(Yes)	(No)
insurances	(Yes)	(No)	(Yes)	(No)

<u>If yes to any please explain</u>

**Total Monthly Expenditure** 

£

£





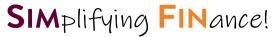
### **Liabilities**

	Type of loan:	Type of loan:
	(Credit card) (Personal Loan)	(Credit card) (Personal Loan)
	(Hire Purchase Agreement)	(Hire Purchase Agreement)
Reason:		
Lender Name:		
Term of loan:		
Repayment Date:		
Outstanding:		
Monthly Payment:		
	Type of loan: (Credit card) (Personal Loan)	Type of loan: (Credit card) (Personal Loan)
	(Hire Purchase Agreement)	(Hire Purchase Agreement)
Reason:		
Lender Name:		
Term of loan:		
Repayment Date:		
Outstanding:		
Monthly Payment:		
If you have more please add to the	ne notes page	
Other Mortgage monthly		
payments that will exist after	£	£
your next purchase		
Address of other property		
Post code		
Financial Dependents	•	
Gender	(M) (F)	(M) (F)
Full Name		
D.O.B		
Gender	(M) (F)	(M) (F)
Full Name		
D.O.B		
Travel Expenses	£	£
School Fees	£	£
Maintence	£	£
Monthly child care costs Other	£ £	£
	If other please explain:	I

Type of valuation you would like conducted?

(Basic ) (Home Buyers) (Structural)





	(Yes) (No)	If no please give details
	Company Name:	
	Company Address:	
	L .	
	Post code	
	Contact Name:	
A a a a constant Dataila	Contact number:	
Accountant Details	Company Name:	
	Company Address:	
	Post code	
	Contact Name:	
	Contact number:	
Estate agent Details	Company Name:	
Lotate agent Details	Company Address:	
	Company Address.	
	Post code	
	Contact Name:	
	Contact number:	
Purchase property details	·	
Type of property:		
(Freehold) (Leasehold)	(Years left )	
Address:	,	1
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ladi ess.		
tudi ess.		
Year Built Service charge	£	
Year Built Service charge Ground Rent	£ £	
Year Built Service charge Ground Rent Number of reception rooms		
Year Built Service charge Ground Rent Number of reception rooms Number of bedrooms		
Year Built Service charge Ground Rent Number of reception rooms Number of bedrooms How many Kitchens		
Year Built Service charge Ground Rent Number of reception rooms Number of bedrooms How many Kitchens How many bathrooms		

YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE

NB. ADVICE AND PRODUCTION OF A ESIS CAN ONLY BE CARRIED OUT AFTER COMPLETION OF A FULL FACT FIND.

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