

## 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		
Residential Status		
Address History (up to three years 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 about your mortgage and why?

(Cost of Monthly repayments) (Term Of the mortgage)  
(Overall costs) (stability of monthly payments) (other)

Please explain

Purchase Price

£

How much would you like to borrow

£

£

Deposit

£

£

Source of deposit

Any additional savings

(Yes) (No)

(Yes) (No)

£

£

Preferred Term Of Mortgage

Planned Retirement 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)

If yes Please explain

## Credit History

Missed Mortgage 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

(Yes) (No)

(Yes) (No)

Have you ever been Declined any insurances

(Yes) (No)

(Yes) (No)

If yes to any please explain

Total Monthly Expenditure

£

£

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## Liabilities

	Type of loan: (Credit card) (Personal Loan) (Hire Purchase Agreement)	Type of loan: (Credit card) (Personal Loan) (Hire Purchase Agreement)
Reason:		
Lender Name:		
Term of loan:		
Repayment Date:		
Outstanding:		
Monthly Payment:		
	Type of loan: (Credit card) (Personal Loan) (Hire Purchase Agreement)	Type of loan: (Credit card) (Personal Loan) (Hire Purchase Agreement)
Reason:		
Lender Name:		
Term of loan:		
Repayment Date:		
Outstanding:		
Monthly Payment:		

If you have more please add to the 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

£

£

Maintenance

£

£

Monthly child care costs

£

£

Other

£

£

*If other please explain:*

Type of valuation you would like conducted?

(Basic )

(Home Buyers)

(Structural)

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## Contact information

Do you require a Solicitor

(Yes)	(No)	If no please give details
Company Name:		
Company Address:		
Post code		
Contact Name:		
Contact number:		
Company Name:		
Company Address:		
Post code		
Contact Name:		
Contact number:		

Accountant Details

Estate agent Details

Company Name:	
Company Address:	
Post code	
Contact Name:	
Contact number:	

## Purchase property details

Type of property:	
(Freehold)	(Leasehold) (Years left )
Address:	
Year Built	
Service charge	£
Ground Rent	£
Number of reception rooms	
Number of bedrooms	
How many Kitchens	
How many bathrooms	

Notes...

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YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE  
 NB. ADVICE AND PRODUCTION OF A ESI CAN ONLY BE CARRIED OUT AFTER COMPLETION OF A FULL FACT FIND.  
 AUTHORISED AND REGULATED BY THE FINANCIAL CONDUCT AUTHORITY