



MORTGAGE FACTFIND

CLIENT NAME(s)	<i>Applicant 1</i>	<i>Applicant 2</i>
DATE		
ADDRESS BEING MORTGAGED		

DISCLOSURE

BUYER TYPE	HOME OWNER / FIRST TIME BUYER
LOAN PURPOSE	PURCHASE / REMORTGAGE / BUY TO LET / FURTHER ADVICE
SCDD GIVEN	DATE:

LOAN DETAILS

PURCHASE VIA A SPECIAL PURCHASE SCHEME	YES / NO
IF YES – UNDER WHICH SCHEME	RIGHT TO BUY / SHARED OWNERSHIP / HOMEBUY / KEYWORKER / FAMILY SALE
ESTIMATED PROPERTY VALUE	£
LOAN AMOUNT	£
REPAYMENT TYPE	REPAYMENT / INTEREST ONLY / OTHER
SPLIT MORTGAGE	YES / NO
IF YES, AMOUNT ON INTEREST ONLY?	
MORTGAGE TERM (YEARS)	

SOURCE & AMOUNT OF DEPOSIT	
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CONTACT DETAILS

	Applicant 1	Applicant 2
PHONE		
EMAIL		

PERSONAL DETAILS

	Applicant 1	Applicant 2
TITLE		
FIRST NAME		
MIDDLE NAME(s)		
SURNAME		
D.O.B		
GENDER		
NATIONALITY		
MARITAL STATUS		
FACE TO FACE		
DEPENDENTS <i>name, DOB</i>		
RETIREMENT AGE		
CURRENT ADDRESS		
RESIDENTIAL STATUS	<input type="checkbox"/> OWNER WITH MORTGAGE <input type="checkbox"/> OWNER NO MORTGAGE <input type="checkbox"/> LIVING WITH FAMILY/FREINDS <input type="checkbox"/> RENTED <input type="checkbox"/> OTHER	<input type="checkbox"/> OWNER WITH MORTGAGE <input type="checkbox"/> OWNER NO MORTGAGE <input type="checkbox"/> LIVING WITH FAMILY/FREINDS <input type="checkbox"/> RENTED <input type="checkbox"/> OTHER
DATE MOVED IN		
PREVIOUS ADDRESS & RESIDENTIAL STATUS <i>(if less than 3 years)</i>		

EMPLOYMENT & INCOME

	Applicant 1	Applicant 2
EMPLOYMENT STATUS <i>(for self-employed see next page)</i>		
NI NUMBER		
EMPLOYER NAME		
EMPLOYER ADDRESS		
EMPLOYER TEL NUMBER		
INDUSTRY		
JOB TITLE		
DATE STARTED AT EMPLOYER		
BASIC INCOME		
ADDITIONAL INCOME: Bonus Commission Allowances		
ADDITIONAL EMPLOYMENT <i>(if less than 3 years)</i>		

SELF EMPLOYMENT

	Applicant 1	Applicant 2
BUSINESS NAME <i>(please put your name if Sole Trader)</i>		
NATURE OF BUSINESS		
YEAR ESTABLISHED		
YOUR ROLE	<input type="checkbox"/> PARTNER <input type="checkbox"/> SOLE TRADER <input type="checkbox"/> LTD COMPANY DIRECTOR	<input type="checkbox"/> PARTNER <input type="checkbox"/> SOLE TRADER <input type="checkbox"/> LTD COMPANY DIRECTOR
% OF BUSINESS YOU OWN		
FROM WHAT DATE HAVE YOU OWNED THE BUSINESS		
SHARE OF NET PROFIT – Latest Period	£	£
<i>Year Ending</i>		
SHARE OF NET PROFIT – Latest Period	£	£
<i>Year Ending</i>		
SHARE OF NET PROFIT – Latest Period	£	£
<i>Year Ending</i>		
ACCOUNTANT NAME & ADDRESS		

ADDITIONAL INCOME

DETAILS e.g benefits, maintenance		
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FINANCIAL COMMITMENTS

	Applicant 1	Applicant 2
DO YOU HAVE ANY MORTGAGES	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
If YES:	<input type="checkbox"/> SINGLE <input type="checkbox"/> JOINT WITH APP 2 <input type="checkbox"/> OTHER	<input type="checkbox"/> SINGLE <input type="checkbox"/> JOINT WITH APP 1 <input type="checkbox"/> OTHER
IS THIS THE MORTGAGE FOR YOUR CURRENT ADDRESS?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
If NO, PLEASE STATE THE ADDRESS:		
MORTGAGE LENDER		
MORTGAGE ACCOUNT NO.		
PRODUCT TYPE	<input type="checkbox"/> RESIDENTIAL <input type="checkbox"/> BUY TO LET If currently let out what is the monthly rental income: £	<input type="checkbox"/> RESIDENTIAL <input type="checkbox"/> BUY TO LET If currently let out what is the monthly rental income: £
OUTSTANDING BALANCE	£	£
REPAYMENT BASIS	<input type="checkbox"/> REPAYMENT <input type="checkbox"/> INTEREST ONLY <input type="checkbox"/> PART & PART	<input type="checkbox"/> REPAYMENT <input type="checkbox"/> INTEREST ONLY <input type="checkbox"/> PART & PART
START DATE		
OUTSTANDING TERM		
CURRENT MONTHLY PAYMENTS	£	£
WILL THIS MORTGAGE BE REPAYED ON COMPLETION OF NEW MORTGAGE?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<i>If yes, do penalties apply? How much: Expiry Date:</i>		

ADDITIONAL MORTGAGES

	Applicant 1	Applicant 2
ADDRESS		
MORTGAGE LENDER		
MORTGAGE ACCOUNT NO.		
PRODUCT TYPE	<input type="checkbox"/> RESIDENTIAL <input type="checkbox"/> BUY TO LET If currently let out what is the monthly rental income: £	<input type="checkbox"/> RESIDENTIAL <input type="checkbox"/> BUY TO LET If currently let out what is the monthly rental income: £
OUTSTANDING BALANCE	£	£
REPAYMENT BASIS	<input type="checkbox"/> REPAYMENT <input type="checkbox"/> INTEREST ONLY <input type="checkbox"/> PART & PART	<input type="checkbox"/> REPAYMENT <input type="checkbox"/> INTEREST ONLY <input type="checkbox"/> PART & PART
START DATE		
OUTSTANDING TERM		
CURRENT MONTHLY PAYMENTS	£	£
WILL THIS MORTGAGE BE REPAYED ON COMPLETION OF NEW MORTGAGE?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<i>If yes, do penalties apply? How much: Expiry Date:</i>		

CREDIT COMMITMENTS

	Applicant 1	Applicant 2
DO YOU HAVE ANY CREDIT COMMITMENTS	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
TYPE	<input type="checkbox"/> CREDIT CARD <input type="checkbox"/> PERSON LOAN <input type="checkbox"/> SECURED LOAN <input type="checkbox"/> OTHER.....	<input type="checkbox"/> CREDIT CARD <input type="checkbox"/> PERSON LOAN <input type="checkbox"/> SECURED LOAN <input type="checkbox"/> OTHER.....
PROVIDER		
OUTSTANDING AMOUNT	£	£
MONTHLY PAYMENTS	£	£
DATE OF FINAL PAYMENT		
WILL THIS COMMITMENT BE REPAID BEFORE TAKING OUT A NEW MORTGAGE?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<i>If YES, do penalties apply and what is the amount?</i>		

For additional commitments please see next page

CREDIT COMMITMENTS CONTINUED....

	Applicant 1	Applicant 2
DO YOU HAVE ANY CREDIT COMMITMENTS	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
TYPE	<input type="checkbox"/> CREDIT CARD <input type="checkbox"/> PERSON LOAN <input type="checkbox"/> SECURED LOAN <input type="checkbox"/> OTHER.....	<input type="checkbox"/> CREDIT CARD <input type="checkbox"/> PERSON LOAN <input type="checkbox"/> SECURED LOAN <input type="checkbox"/> OTHER.....
PROVIDER		
OUTSTANDING AMOUNT	£	£
MONTHLY PAYMENTS	£	£
DATE OF FINAL PAYMENT		
WILL THIS COMMITMENT BE REPAYED BEFORE TAKING OUT A NEW MORTGAGE?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
<i>If YES, do penalties apply and what is the amount?</i>		

PROPERTY TO BE MORTGAGED

ADDRESS	
PROPERTY TYPE	<input type="checkbox"/> PURPOSE BUILT FLAT <input type="checkbox"/> CONVERTED FLAT <input type="checkbox"/> STUDIO FLAT <input type="checkbox"/> MAISONETTE <input type="checkbox"/> BUNGALOW <input type="checkbox"/> TERRACED HOUSE <input type="checkbox"/> END OF TERRACE HOUSE <input type="checkbox"/> SEMI DETACHED HOUSE <input type="checkbox"/> DETACHED HOUSE <input type="checkbox"/> MANSION HOUSE
No. OF BEDROOMS	
ESTIMATED VALUATION OR PURCHASE PRICE	£
ESTATE AGENT DETAILS <i>(if a private sale, please write 'private sale')</i>	
SOLICITOR DETAILS	
DIRECT DEBIT	ACCOUNT NO: SORT CODE: NAME: