



FACT FIND

DATE OF FACT FIND	
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PERSONAL DETAILS

	Applicant 1	Applicant 2
TITLE		
FIRST NAME		
MIDDLE NAME(s)		
SURNAME		

CONTACT DETAILS

	Applicant 1	Applicant 2
PHONE		
EMAIL		

	Applicant 1	Applicant 2
GENDER		
DATE OF BIRTH		
NATIONALITY (S)		
MARITAL STATUS		
FACE TO FACE meeting with broker?	Yes/ No	Yes/ No
DEPENDENTS names: D.OB:		
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 (if less than 3 years)		

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		
ADDITONAL INCOME: <div style="text-align: right; padding-right: 20px;"> Bonus: Commission: Allowances: </div>		
ADDITONAL 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

IF YOU HAVE MORE THAN ONE MORTGAGE PLEASE COMPLETE OUR PROPERTY PORTFOLIO!

	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 REPAYD 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 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>		

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 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>		

PROPERTY DETAIL (FOR PROPERTY TO BE MORTGAGED)

<p>ADDRESS</p> <p><i>Please also provide us with the rightmove sales link if possible</i></p>	
<p>PROPERTY TYPE</p>	<p><input type="checkbox"/> PURPOSE BUILT FLAT</p> <p><input type="checkbox"/> CONVERTED FLAT</p> <p><input type="checkbox"/> STUDIO FLAT</p> <p><input type="checkbox"/> MAISONETTE</p> <p><input type="checkbox"/> BUNGALOW</p> <p><input type="checkbox"/> TERRACED HOUSE</p> <p><input type="checkbox"/> END OF TERRACE HOUSE</p> <p><input type="checkbox"/> SEMI DETACHED HOUSE</p> <p><input type="checkbox"/> DETACHED HOUSE</p> <p><input type="checkbox"/> MANSION HOUSE</p>
<p>No. OF BEDROOMS</p>	
<p><u>IF A LEASEHOLD FLAT</u></p> <p>Years left on lease: Ground Rent: Service Charge:</p>	
<p>AGREED PURCHASE PRICE</p>	<p align="center">£</p>
<p>ESTATE AGENT DETAILS</p> <p><i>(if a private sale, please write 'private sale')</i></p>	
<p>SOLICITOR DETAILS</p>	