

Mortgage Questionnaire

Client Details	Applicant 1	Applicant 2
Title		
First Name		
Surname		
Previous Surname (if any)		
Date Name Changed		
Nationality		
If not British, do you have a permanent right to reside in the UK?		
Date of Birth		
Marital Status		
Current Address		
How long have you lived at this address?		
If less than 3 years please state previous address		
Dates at previous address		
Current Home Telephone		
Work Telephone		
Mobile Phone		
Email Address		
How many dependents do you have and their ages?		
Who do you bank with?		
Do you own your home, rent or live with family?		

Client Details	Applicant 1	Applicant 2
If rent, what do you pay per month?		
If own, do you have a mortgage on this home?		
If so who is your current lender?		
Amount owed?		
What rate (if known)?		
Monthly payment?		
How many years remaining?		
Do you have any tie-ins if you repay this mortgage? If so when do they end?		
Are you selling this property?		
If not, what rent do you expect to receive?		
Any credit problems (defaults, CCJ's, bankruptcy)?		
If so, please provide details		

Other Property Owned

Address	Date Purchased	Current Value	Mortgage Lender	Amount Owed	Monthly Mortgage	Rental Income

If Buying:

	Applicant 1	Applicant 2
Property Purchase Price		
What deposit do you have?		
Residential or Buy-To-Let?		
Where is the deposit coming from?		

If Remortgaging:

	Applicant 1	Applicant 2
Current Value?		
Total Amount Required?		
Residential or Buy-To-Let?		

Occupations

Details	Applicant 1	Applicant 2
Occupation		
Employment Status		
Employer/Business Name		
Employer/Business Address		
Date Started		
Gross Annual Income / Net Profit		
Any benefits (Tax Credits etc)?		
Any Other Source of Income? (Please state what and how much)		

Liabilities

Liabilities	Applicant 1	Applicant 2	Joint	Total Monthly Payment
Do you have any loans? If so, for each loan: Lenders name? Amount owed? Monthly Payment? Is this to be repaid?				
Do you have any credit or store card balances? If so, for each card: Lenders name? Current balance? Monthly Payment? Is this to be repaid?				

Please provide the following Information

- Copy of Passports (and VISA's if applicable)
- Copy of most recent month's bank statements
- Copy 3 most recent payslips
- Copy of most recent p60
- If self employed, copy of last 3 years SA302 letters from HMRC confirming income

Chande IFA Ltd will obtain an agreement-in-principle based on the information provided above. A mortgage offer is subject to the information you have supplied being correct, proof of income and a satisfactory survey.

A non-refundable fee of £250 is payable on application (after we have obtained an agreement-in-principle).

Ralph Properties is acting as an introducer and will not provide any financial advice. This form will be passed onto Chande IFA Ltd and they may contact you for more information prior to being able to provide an agreement in principle.

Your information will be kept confidential for data protection purposes