**Mortgage Questionnaire**

\*NOTE – Use the Tab button to navigate questions on each section to instantly overwrite the examples

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| **Personal Details** |
| Full Name (as Shown on Passport) | First Name | Middle Name(s) | Surname |
| Previous names plus Date changed | Maiden / Previous / Other Names | Date Changed |
| Date of birth | DD / MM / YYYY |
| Marital Status | Single / Married / Separated / Co-Habiting |
| Children / financial dependants? | How Many | Full Names | Date of Birth |
| Citizenship | Nationality | Place of Birth |
| National insurance number | 9 digits long |
| Contact Details | Telephone | Mobile | Email |

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| **Current & Previous Address (Past 3 Years)** |
| Full Details - Must Cover past 3 Years | Full Address and Postcode |
| Purchased DD/MM/YY | From DD/MM/YY | To DD/MM/YY |
| Full Address and Postcode |
| Purchased DD/MM/YY | From DD/MM/YY | To DD/MM/YY |
| Current residential status | Renting / Homeowner / Living with family /etc… |

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| **Place of Work** |
| Occupation | Job Title |
| Employment Status | Employed | Self Employed |
| Employed or Self-Employed Company Details | Company Name |
| Full Address and Postcode |
| Phone Number |
| Start Date DD/MM/YY |
| If less than 6 Months - Previous Company Details | Company Name |
| Full Address and Postcode |
| Phone Number |
| Start Date DD/MM/YY | End Date DD/MM/YY |
| Annual Basic Income (Gross) | Annual Gross £ |
| Bonuses | Bonus £ | Guaranteed Y/N? |
| Commissions | Commission £ | Guaranteed Y/N? |
| Monthly Basic Income (Net) | Monthly Net £ |
| Retirement Age | i.e. 55 / 65 / 70  |
| Self Employed Only Your Accountant | Account Qualification i.e. CIMA / AAT / ACCA |
| Accountant Name |
| Full Address and Postcode |
| Phone Number |
| Email Address |
| Salary plus Dividends  | Annual Gross £ |
| Net profits for last 3 years | Year 1 £ | Year 2 £ | Year 3 £ |

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| **How did you hear about Informed IFA?** |
| i.e. Word of Mouth / Advert / Recommendation |

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| **Monthly Financial Outgoings** |
| Council Tax & utilities | £ | Food & clothing | £ |
| Loan/card payments | £ | Life/other insurances | £ |
| Pension | £ | Childcare/maintenance | £ |
| Transport Costs (e.g. Rail card/Fuel) | £ | Holidays | £ |
| Going out / social | £ | Savings | £ |
| Satellite / Cable TV | £ | Other (please list) | £ |

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| **Loan / Mortgage / Credit Card Commitments** |
| Lender Name & Loan Type | Loan Amount | Balance | Monthly Payment | Secured against property? | Applicant Name | Loan repayment dates |
| i.e. RBS / Repayment | £ | £ | £ | Yes / No |   | DD/MM/YYYY |
| i.e. Credit Card | £ | £ | £ | Yes / No |   | DD/MM/YYYY |
| i.e. Car Loan | £ | £ | £ | Yes / No |   | DD/MM/YYYY |
|  | £ | £ | £ | Yes / No |   | DD/MM/YYYY |
|  | £ | £ | £ | Yes / No |   | DD/MM/YYYY |

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| **Buy to Lets / 2nd Homes (If over 2 please complete Property Portfolio document)** |
| Lender Name & Mortgage Type | Balance | Monthly Payment | Rental Income | Property Valuation | Applicant Name |
| i.e. RBS / BTL Int. Only | £ | £ | £ | £ |   |
| i.e. NatWest / Holiday Repay | £ | £ | £ | £ |   |

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| **Assets & Savings** |
| Asset Type | Value | Monthly Payment | Applicant Name |
| i.e. Classic Cars / Art / Wine | £ | £ |   |
| i.e. Savings / Investments | £ | £ |   |

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| **Your Current Home / Residential Property** |
| Lender Name & Mortgage Type | Balance | Monthly Payment | When Purchased | Property Valuation |
| i.e. RBS / Repayment | £ | £ | DD/MM/YY | £ |

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| **Property Being Mortgaged Details – Please provide as much detail as possible** |
| Full Address & Postcode |   |
| Property details:  | Detached / Semi Detached Terraced (end or Mid) / Flat / Maisonette | No. of Bedrooms & Other rooms | Garage / Off street parking |
| Year Built | Construction i.e. Brick, Roof Slate | Flat Roof percentage |
| Flooding / Subsidence? | Detail History if applicable |
| Freehold or Leasehold? | Freehold / Leasehold |
| If Leasehold | Years left on Lease | Ground rent & Service charge £ |
| Current Mortgage Details | Lender Name & Mortgage Type | Balance £ | Monthly Payment £ |
| Property Value / Agreed Price & Deposit | Property Value £ | Deposit £ |
| Mortgage Type Preference | i.e. Portable / Offset / Fixed / Capped / Maximum fees / Cashback Repayment OR Interest Only  |
| Buy to Let Only | Anticipated rental income £ |
| **Conveyancing Solicitor’s details** |
| **No Solicitor? We can arrange this for you Ask for a low-cost Quote** | Firm Name, Address and Postcode |
| Name of Case Handler |
| Email |
| Telephone Number / Ext. |

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| **Estate Agent / Developer or Private Sale details** |
| Purchased Via | Estate Agent | Developer | Private Sale |
| Contact Details | Full Name, Address and Postcode |
| Name of Case Handler / Agent Name / Developer / Private Owner |
| Email |
| Telephone Number / Ext. |

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| **Credit History – If you are unsure of your credit score – Go to www.Experian.co.uk and obtain your score** |
| How would you rate your Credit Score | Poor / Average / Excellent |
| Any adverse credit history? | i.e. CCJs, Bankruptcy, IVA’s, Debt Management Plan (DMP), Missed payments (Card / Loan / Mortgage) |
| If Yes - Please Provide Details |   |

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| **Bank Account Details / Card details**  |
| Name on Account | Bank Account Number | Sort Code |
| Card Type i.e. Visa / Mastercard | Card Number | Expiry date MM/YY | CSV Code  |

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| **Additional Notes or other things we should know** |
| **Please summarise what you’re hoping to do**  |
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| **Original Documents we need from you** |
| Current Passport or Driving Licence |  Image result for tick Symbol | Last Month’s Bank Statement |  Image result for tick Symbol |
| Last 3 Payslips |  Image result for tick Symbol | Most Recent P60 |  Image result for tick Symbol |
| Self Employed Only 3 years (Min 1 Year) **ONE** of the following  | Signed off Accounts  | Tax Calculation Plus Tax Years Overview | SA302s |