

Mortgage Inquiry Form

To allow me to research the market and find an appropriate deal for you, I'll need some information.

To make things easy, I have devised this simple form to complete, If you reply to this e-mail then complete the boxes, or download it to complete it. I'll gladly see what I can do for you.... Alternatively, I can arrange to do this quite quickly over the phone if you prefer.

Not all items need be completed, but the more you can complete the better it is to source the best option for you.

If this has been sent by e-mail, simply hit reply and enter data in the relevant boxes then send...

Information Needed	Applicant 1	Applicant 2
Full Names (including middle names)		
Previous or Maiden Name (& date changed)		
Date of Birth		
Smoker Status		
Nationality		
Dependent Children (Names and DOB)		
Current Address including Postcode		
Date move to this address . (I need 3 years address history)		
Contact Numbers	Home Work Mobile	Home Work Mobile
E-mail Addresses		
Nature of Residency	le: Tenant, Owner, Family, Friends	le: Tenant, Owner, Family, Friends
Additional Address (if above is less than 3 yrs)		

Nature of Residency	le: Tenant, Owner, Family, Friends	le: Tenant, Owner, Family, Friends
Additional Addresses and dates of residency if needed		
Nature of Residency	le: Tenant, Owner, Family, Friends	le: Tenant, Owner, Family, Friends
Employment		
Job Title and or Duties		
Current Employer Name & Address		
Time with Current Employer		
Salary (if Self Employed, 3 yrs Net Profits)		
Overtime or Bonuses		
Additional Income (Tax Credits, Maint)		
Mortgage Data		
Mortgage Amount Requested	£	
Term of Loan	?? Years	
Deposit Available	£	
Deposit Source	Savings, Gift, Equity etc?	
Preferred Rate Option and term	Fixed, Tracker, Variable – 2,3,4 or 5 years	
Repayment Method	Interest Only or Repayment	
CURRENT MORTGAGE DATA		
Current Mortgage Lender		
Current Mortgage Rate		
Current Amount Owed		
Any Penalties and Details		
Property Details (if Known)		
Property Type	Det/Semi/Terr	
Bedrooms		
Garaging & Parking		
Tenure (Freehold or Leasehold) If Leasehold, what is the remaining Lease?		
Address if Known		

Estate Agents Details			
Any Restrictions or Covenants			
Financial			
Any outstanding Loans (please detail each one)	Lender: Outstanding: Monthly Payment: Term of Loan:		Lender: Outstanding: Monthly Payment: Term of Loan:
	Lender: Amount Outstanding: Monthly Payment: Term of Loan:		Lender: Amount Outstanding: Monthly Payment: Term of Loan:
Is this/are these to be paid off before New Mortgage	Yes or No		Yes or No
Any outstanding Credit Cards	Card Company: Amount Outstanding: £		Card Company: Amount Outstanding: £
Is this/are these to be paid off before New Mortgage (list each one accordingly)	Yes or No		Yes or No
Any Adverse Credit, Missed Payments, CCJ, Defaults, Arrears (please detail)			
Bank Details Sort Code Account Number			
Other Information			
Your Mothers Maiden Name (Lenders future security question)			
Additional Information you feel to be important			

Do you require me to an agreement in principle from the most appropriate lender?	Yes or No
Quick Budget Planner	
Rent	
Council Tax	
Utilities	
Phone/Internet/TV	
Housekeeping	
Travel	
Childcare	
Maintenance/Alimony	
Motoring/Car Insurance	
Household Insurance	
Life/Protection Insurance	
Regular Savings/Pensions	
Other Expenditure	
Existing Mortgage if Held	
Lender?	
Amount Owed	
Interest only or Repayment	
Existing Product (fixed/variable)	
Date mortgage Stated	
Term of Loan	
Monthly Payment	
Account Number	



As a Self Employed, Independent Mortgage Advisor, I have a flexible approach to working as an so if you need to discuss things out of hours, my mobile is generally switched on, however, as I am a family man, there may be occasions where this out of hours might be temporarily inconvenient and I would advise of this and call back when I could (I trust this makes sense)

I trust this is helpful for your funding requirements; should you have any questions at all, please don't hesitate to contact me at any time.

Additional information & reviews about me and my services can be seen at:

- www.moneywest.co.uk (company site)
- www.trevorbranton.co.uk (personal site)

Complete and e-mail back to me or or fax to 08444 10 11 14

Kind Regards

Trevor Branton