



# FACT FIND

Date

## PART 1

Personal Details	First Applicant	Second Applicant
Title		
Surname		
First name		
Middle name		
Gender		
Previous name and date changed (if applicable or married)		
Marital status		
Date of birth		
Nationality If non EU, permanent rights to reside in the UK?		
Have you smoked in the last 12 months?		
Dependents (names and date of birth)		

Contact Details	First Applicant	Second Applicant
Telephone: Home/Work		
Mobile		
Personal email address		
Current address		
Owner/Tenant/Living with parents/friends		
Date moved to current address		

## Notes

Contact Details (continued)	First Applicant	Second Applicant
Previous addresses (If less than 3 years at current address)  If more than one address, please list others in Notes section		
Owner/Tenant/Living with parents/friends		
Dates		
If currently renting: name and contact details of current landlord		

Current Employment and Income	First Applicant	Second Applicant
Employed or self-employed (Permanent/contract/probation)		
Job title		
Name and address of employer or business		
Start date		
National Insurance No.		

Income	First Applicant	Second Applicant
Basic annual salary		
Overtime		
Bonuses		
Commission		
Additional income/allowances		
Dividends		
Payslip deductions		
Net monthly income		

<b>Notes</b>
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<b>Self Employed / Company Director</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Shareholding		
Net profit last year 20..		
Net profit previous year 20..		
Net profit year before 20..		
Accountants name and contact details		

<b>Current Mortgage Details</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Lender		
Mortgage account number		
Current monthly mortgage payment		
Property value		
Outstanding mortgage amount		
Repayment method		
Remaining term of mortgage		
Rate type		
Early repayment charge		

<b>Any Other Mortgages Held</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Current lender		
Mortgage account number		
Current monthly mortgage payment		
Property value		
Outstanding mortgage amount		
Repayment or interest only		
Remaining term of mortgage		
Address of property		
Rent received per month		

**Notes**

New Mortgage Details	First Applicant	Second Applicant
New property purchase price (or value for remortgage)		
Deposit/Equity available		
Mortgage amount required		
Budget for monthly payments		

### Commitments

Which bank do you use?

### Loans/Credit Cards/Car Finance

First or Second Applicant	Lender	Type	Start date	End date	Current balance	Monthly payment	Repay before mortgage starts?

### Other Committed Expenditure

First or Second Applicant	Type	Monthly cost	Years remaining

### Credit History

	Yes / No	Details
Mortgage or loan refused?		
Judgement for debt/default registered?		
Declared bankrupt?		
Missed payments on credit commitments?		

**Notes**

### Details of Assets Held - Savings

Asset Type	Value	Details

### Details of Existing Insurance Policies

Type	Insurer	Policy number	Owner	Sum assured	Premium

### Details of Pension Plans

Type	Insurer/Provider	Policy number	Owner	Anticipated income in retirement	Premium

### Notes



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## PART 2

<b>Full Name(s)</b>	
<b>New Property Details</b>	
Address	
Property type Terraced/Semi-detached/Detached or Flat	
Property Construction Type	
If flat:	
Purpose built/conversion	
Unexpired years on lease?	
Which floor and no. of floors in building?	
Service Charge / Ground Rent?	£                      pa /    £                      pa
No. of bedrooms	
No. of living rooms	
No. of bathrooms	
Garage/parking	
Year property built	

<b>Additional Details</b>	<b>First Applicant</b>	<b>Second Applicant</b>
Any health issues?		
Anticipated retirement age		
Do you have an up-to-date will?		

<b>Notes</b>

