

Hurst Independent Financial Services

This questionnaire is designed to provide a mortgage adviser with information required by the Financial Services and Markets Act 2000. With your permission it may be used to obtain an agreement in principle from a potential lender for a mortgage.

Any agreement obtained will be for guidance only and does not constitute a guarantee that a full application will be accepted. The lender may record any search carried out on your credit report.

By completing the following form you are confirming that you are granting us your 'express permission' to contact you by phone to discuss your mortgage requirements.

Periodically your adviser may need to confirm the information is correct.

To ensure that suitable advice is provided and recommendations are based on sound information, it is important that the questions are answered as fully as possible.

HURST INDEPENDENT AGREEMENT IN PRINCIPLE FORM

<u>Details</u>	<u>Applicant One</u>	<u>Applicant Two</u>
Full Name (as on passport including all middle names)		
Previous name (if changed in last six years) Please state date and reason for change		
Marital Status		
Nationality (if not British then details of visa for residency)		
Country of Residence		
Length of time in Resident Country		
Date of Birth:		
Anticipated retirement age		
No. of Dependants (please state ages)		
Smoker Yes/No		
Telephone Numbers:	Home: Work: Mob:	Home: Work: Mob:
Current Address:		
Living Situation:	Owner /Renting/With Family	Owner /Renting/With Family
Date moved in:		
Previous Address: (if current less than 3 years please state 3 years address history)		
Living Situation:	Owner /Renting/With Family	Owner /Renting/With Family
Date moved in:		
Previous Previous address:		

<u>Living Situation:</u>	Owner /Renting/With Family	Owner /Renting/With Family
<u>Date moved in:</u>		
<u>If renting: What is your monthly payment</u>		
<u>Name, address & telephone number of current Landlord</u>		
<u>Homeowners:</u> (1)Current Lender, (2)balance outstanding (3) monthly payment (4) Value of property		
<u>Existing Buy to Let Mortgages:</u> Please state: (1)Lenders Name(s) (2)Mortgage Amount(s) (3)Rental income(s) (4)Current monthly payment(s) (5) Property value(s)		
<u>Are you Self Employed</u> Yes/No		
<u>Nature of Business</u>		
<u>Company Name</u>		
<u>% of Company owned</u>		
<u>Year Business established</u>		
<u>No. of years accounts available?</u>		
<u>Net Income</u>	£	
Previous Years net income	£	
Year before that net income	£	
<u>Employed Applicants</u> <u>What is your Occupation</u>		
<u>Employers Name, address & tel no</u>		
<u>Length of time with Employer:</u>		
<u>If employed less than 1 yr previous occupation & employer</u>		
<u>Details of any probationary period?</u>		
<u>Current Gross Basic Salary:</u>		
<u>Overtime (please state whether guaranteed or regular)</u>		
<u>Bonus (please state whether guaranteed or regular)</u>		

<u>Pension Income (Gross) PA</u>		
<u>Any Loans/ Credit Card/Child Maintenance/Deductions from Salary e.g. travel loans/pension contributions/student loan: Please list providers, balances, monthly payments & outstanding amounts: PLEASE INDICATE IF ANY AMOUNTS ARE TO BE REPAYED BEFORE THE MORTGAGE STARTS</u>		
<u>Do you have any adverse credit registered against your name - If yes please give details</u>		
<u>Is new mortgage for a residential purchase or an investment</u>		
Details of property being purchased i.e. Flat, house, new build property, ex-local authority etc		
<u>Purchase Price</u>		
<u>Loan Requested</u>		
<u>Term of mortgage</u>		
<u>Interest Only or Repayment</u>		
<u>Fixed or Tracker (if fixed how long for?)</u>		