



## Mortgage Questionnaire

### 1 Personal Details

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Title</b>   |          |          |
| <b>First Name</b>  |          |          |
| <b>Middle Name(s)</b>  |          |          |
| <b>Surname</b>   |          |          |
| <b>Previous / Maiden Name</b>  |          |          |
| <b>Marital Status</b>  |          |          |
| <b>Current Address</b>   |          |          |
| <b>Post Code</b>   |          |          |
| <b>Date Move in to Current Address</b>   |          |          |
| <b>Residential Status</b><br><small>(eg homeowner, renting, living with relatives etc)</small> |          |          |
| <b>Date of Birth</b>   |          |          |
| <b>Home Telephone</b>  |          |          |
| <b>Mobile Telephone</b>  |          |          |
| <b>Work Telephone</b>  |          |          |
| <b>Email Address</b>   |          |          |
| <b>Nationality</b>   |          |          |

### 2 Children & Dependants

| Name | Age | Name | Age |
|------|-----|------|-----|
|      |     |      |     |
|      |     |      |     |

### 3 Previous Residences

If you have lived at your current address for less than three years, please complete this section.

|   | Client 1 | Client 2 |
|---|----------|----------|
| <b>Previous Address 1</b>   |          |          |
| <b>Post Code</b>  |          |          |
| <b>Date Moved In</b>  |          |          |
| <b>Date Moved Out</b>   |          |          |
| <b>Residential Status</b><br>(eg homeowner, renting, living with relatives etc) |          |          |
| <b>Previous Address 2</b>   |          |          |
| <b>Post Code</b>  |          |          |
| <b>Date Moved In</b>  |          |          |
| <b>Date Moved Out</b>   |          |          |
| <b>Residential Status</b><br>(eg homeowner, renting, living with relatives etc) |          |          |

### 4 Employment Details

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Employment Status</b><br>(employed, self-emp, retired, housekeeper, unemployed) |          |          |
| <b>National Insurance Number</b>   |          |          |

#### 4.1 Employer Details

If self-employed, go to section 5.

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Current Employer</b>  |          |          |
| <b>Basis of Employment</b><br>(full time, part time, fixed contract etc) |          |          |

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Employer Address</b>  |          |          |
| <b>Telephone Number</b>  |          |          |
| <b>Occupation / Job Title</b>  |          |          |
| <b>Start Date</b>  |          |          |
| <b>Are you on probation?</b>   |          |          |
| <b>Probation End Date</b>  |          |          |
| <b>Do you have a second occupation(s)?</b><br><i>(If yes, please provide further details in notes section)</i> |          |          |

**Previous Employer (if less than 12 months with current employer)**

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Previous Occupation / Job Title</b> |          |          |
| <b>Previous Employer</b>               |          |          |
| <b>Previous Start Date</b>             | / /      | / /      |
| <b>Previous End Date</b>               | / /      | / /      |

**4.2 Gross Employment Income (Annual)**

|                                   | Client 1 | Client 2 |
|-----------------------------------|----------|----------|
| <b>Basic Salary</b>               | £ p.a.   | £ p.a.   |
| <b>Car Allowance</b>              | £ p.a.   | £ p.a.   |
| <b>Guaranteed Bonus</b>           | £ p.a.   | £ p.a.   |
| <b>Guaranteed Overtime</b>        | £ p.a.   | £ p.a.   |
| <b>Guaranteed Shift Allowance</b> | £ p.a.   | £ p.a.   |
| <b>Regional Weighting</b>         | £ p.a.   | £ p.a.   |
| <b>Other</b>                      | £ p.a.   | £ p.a.   |
| <b>Bonus/Commission (regular)</b> | £ p.a.   | £ p.a.   |
| <b>Overtime (regular)</b>         | £ p.a.   | £ p.a.   |
| <b>Shift Allowance (regular)</b>  | £ p.a.   | £ p.a.   |
| <b>Other</b>                      | £ p.a.   | £ p.a.   |

## 5 Self-Employed Business Details

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Name of Business</b>  |          |          |
| <b>Address</b>   |          |          |
| <b>Occupation / Job Title</b>  |          |          |
| <b>Type of Business</b>  |          |          |
| <b>Date Business Started / Holding Acquired</b><br><i>(if less than 1 year, please provide previous employment details in the Notes section)</i> | / /      | / /      |
| <b>Business Status</b><br><i>Sole trader, limited co, LLP</i>  |          |          |
| <b>Company Registration No</b>   |          |          |
| <b>Percentage Shareholding in Business</b>   | %        | %        |
| <b>Are you a contractor?</b>   |          |          |

### 5.1 Self-Employed Income

|  | Client 1                 | Client 2 |
|--|--------------------------|----------|
| <b>Number of Years' Accounts / Self-Assessment Available</b> |                          |          |
|  | <b>Latest Year (1)</b>   |          |
| <b>Year End</b>  |                          |          |
| <b>Net Profit (before taxation)</b>                          | £ p.a.                   | £ p.a.   |
| <b>Net Dividend (if Ltd)</b>                                 | £ p.a.                   | £ p.a.   |
| <b>Director's Salary (if Ltd)</b>                            | £ p.a.                   | £ p.a.   |
|  | <b>Previous Year (2)</b> |          |
| <b>Year End</b>  |                          |          |
| <b>Net Profit (before taxation)</b>                          | £ p.a.                   | £ p.a.   |
| <b>Net Dividend (if Ltd)</b>                                 | £ p.a.                   | £ p.a.   |
| <b>Director's Salary (if Ltd)</b>                            | £ p.a.                   | £ p.a.   |

### 5.2 Accountant Details

|  |  |
|--|--|
| <b>Name of Firm and Contact Name</b>   |  |
| <b>Address and Contact Details</b><br><i>(phone number and/or email address)</i> |  |

## 6 Other Gross Income (Annual)

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Rental Income</b>                           | £ p.a.   | £ p.a.   |
| <b>Child Benefit</b>                           | £ p.a.   | £ p.a.   |
| <b>Working Tax Credit</b>                      | £ p.a.   | £ p.a.   |
| <b>Child Tax Credit</b>                        | £ p.a.   | £ p.a.   |
| <b>Disability Benefits</b> (e.g. DLA, PIP etc) | £ p.a.   | £ p.a.   |
| <b>Pension (State)</b>                         | £ p.a.   | £ p.a.   |
| <b>Pension (Private)</b>                       | £ p.a.   | £ p.a.   |
| <b>Investment(s)</b>                           | £ p.a.   | £ p.a.   |

## 7 Future Changes to Employment

|  | Client 1 | Client 2 |
|--|----------|----------|
| <b>Do you expect your employment circumstances to change?</b><br><i>(If yes please provide details in Notes)</i> |          |          |

## 8 Future Changes to Income & Retirement

|   | Client 1 | Client 2 |
|---|----------|----------|
| <b>Do you expect your income to change in the foreseeable future?</b> |          |          |
| <b>What is your State Pension Age?</b>                                |          |          |
| <b>What is your expected retirement age?</b>                          |          |          |

## 9 Existing Credit & Commitments

Please tick if you have any of the following and provide further details in the relevant sections.

|   | Client 1                 | Client 2                 |
|---|--------------------------|--------------------------|
| <b>Personal Loan(s)</b><br><i>(Section 9.1)</i>                               | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Hire Purchase(s)</b><br><i>(Section 9.2)</i>                               | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Credit Card(s) / Store Card(s) / Mail Order(s)</b><br><i>(Section 9.3)</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Overdraft(s)</b><br><i>(Section 9.4)</i>                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Spousal Maintenance</b><br><i>(Section 9.5)</i>                            | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Child Maintenance</b><br><i>(Section 9.6)</i>                              | <input type="checkbox"/> | <input type="checkbox"/> |

## 9.1 Personal Loan(s)

|                                     | 1 | 2 |
|-------------------------------------|---|---|
| <b>Lender / Company</b>             |   |   |
| <b>Borrower<br/>(1, 2 or joint)</b> |   |   |
| <b>Purpose</b>                      |   |   |
| <b>Start Date</b>                   |   |   |
| <b>End Date</b>                     |   |   |
| <b>Original Loan Amount</b>         | £ | £ |
| <b>Amount Outstanding</b>           | £ | £ |
| <b>Monthly Payment</b>              | £ | £ |

|                                     | 3 | 4 |
|-------------------------------------|---|---|
| <b>Lender / Company</b>             |   |   |
| <b>Borrower<br/>(1, 2 or joint)</b> |   |   |
| <b>Purpose</b>                      |   |   |
| <b>Start Date</b>                   |   |   |
| <b>End Date</b>                     |   |   |
| <b>Original Loan Amount</b>         | £ | £ |
| <b>Amount Outstanding</b>           | £ | £ |
| <b>Monthly Payment</b>              | £ | £ |

## 9.2 Hire Purchase & Lease

|                                     | 1 | 2 |
|-------------------------------------|---|---|
| <b>Lender / Company</b>             |   |   |
| <b>Borrower<br/>(1, 2 or joint)</b> |   |   |
| <b>Purpose</b>                      |   |   |
| <b>Start Date</b>                   |   |   |
| <b>End Date</b>                     |   |   |
| <b>Original Loan Amount</b>         | £ | £ |
| <b>Amount Outstanding</b>           | £ | £ |
| <b>Monthly Payment</b>              | £ | £ |

### 9.3 Credit Card / Store Card / Mail Order

|   | 1 | 2 |
|---|---|---|
| <b>Lender / Company</b>                       |   |   |
| <b>Borrower</b><br>(1, 2 or joint)            |   |   |
| <b>Credit Limit</b>                           | £ | £ |
| <b>Amount Outstanding</b>                     | £ | £ |
| <b>Do you pay the full amount each month?</b> |   |   |
|   | 3 | 4 |
| <b>Lender / Company</b>                       |   |   |
| <b>Borrower</b><br>(1, 2 or joint)            |   |   |
| <b>Credit Limit</b>                           | £ | £ |
| <b>Amount Outstanding</b>                     | £ | £ |
| <b>Do you pay the full amount each month?</b> |   |   |

### 9.4 Overdraft

|                                    | 1 | 2 |
|------------------------------------|---|---|
| <b>Lender</b>                      |   |   |
| <b>Borrower</b><br>(1, 2 or joint) |   |   |
| <b>Overdraft Limit</b>             | £ | £ |
| <b>Current Balance</b>             | £ | £ |

### 9.5 Spousal Maintenance

|                 | Client 1 | Client 2 |
|-----------------|----------|----------|
| <b>End Date</b> |          |          |
| <b>Amount</b>   | £ p.m.   | £ p.m.   |

### 9.6 Child Maintenance

|                 | Client 1 | Client 2 |
|-----------------|----------|----------|
| <b>End Date</b> |          |          |
| <b>Amount</b>   | £ p.m.   | £ p.m.   |

## 9.7 Existing Property & Mortgages

|   |  |
|---|--|
| How many residential properties do you own? |  |
| How many buy-to-let properties do you own?  |  |

## 9.8 Existing Residential Property

|  | Existing Residential (1) | Existing Residential (2) |
|--|--------------------------|--------------------------|
| <b>Property Address</b>  |                          |                          |
| <b>Owner</b><br>(1, 2 or joint)  |                          |                          |
| <b>Current Value of Property</b>   | £                        | £                        |
| <b>Is there a mortgage secured against this property?</b>                              |                          |                          |
| <b>Lender</b>  |                          |                          |
| <b>Mortgage Account Number</b>   |                          |                          |
| <b>Amount of Loan Outstanding</b>  | £                        | £                        |
| <b>Term Remaining</b>  |                          |                          |
| <b>To be Redeemed?</b>   |                          |                          |
| <b>Current Interest Rate (%)</b>   |                          |                          |
| <b>Monthly Mortgage Payment</b>  | £ p.m.                   | £ p.m.                   |
| <b>Interest Rate Type</b><br>(eg, fixed, tracker, variable)                            |                          |                          |
| <b>Does an Early Repayment Charge (ERC) apply?</b><br>(if so, how much and until when) |                          |                          |
| <b>Repayment method?</b><br>(repayment, interest only, part and part)                  |                          |                          |



## 9.9 Existing Buy to Let Property(ies)

|  | Existing Buy to Let (1) | Existing Buy to Let (2)                                  |
|--|-------------------------|--|
| <b>Property Address</b>  |                         |  |
| <b>Owner</b><br>(1, 2 or joint)  |                         |  |
| <b>Estimated Property Value</b>  | £                       | £  |
| <b>Current Value of Property</b>   | £                       | £  |
| <b>Is property currently let?</b><br>(if so, monthly rent?)                            |                         |  |
| <b>Is there a mortgage secured against this property?</b>                              |                         | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Lender</b>  |                         |  |
| <b>Mortgage Account Number</b>   |                         |  |
| <b>Amount of loan outstanding</b>  | £                       | £  |
| <b>Term remaining</b>  |                         |  |
| <b>To be redeemed?</b>   |                         | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Current interest rate (%)</b>   |                         |  |
| <b>Monthly mortgage payment</b>  | £                       | £  |
| <b>Interest Rate Type</b><br>(eg, fixed, tracker, variable)                            |                         |  |
| <b>Rate End Date</b>   |                         |  |
| <b>Does an Early Repayment Charge (ERC) apply?</b><br>(if so, how much and until when) |                         |  |
| <b>Repayment method?</b><br>(repayment, interest only, part and part)                  |                         |  |

## 10 Bank Accounts, Savings & Investments

| Owner<br>(1,2 or joint) | Account Type | Provider | Amount | Monthly<br>Contribution |
|-------------------------|--------------|----------|--------|-------------------------|
|                         |              |          | £      | £ p.m.                  |
|                         |              |          | £      | £ p.m.                  |
|                         |              |          | £      | £ p.m.                  |
|                         |              |          | £      | £ p.m.                  |
|                         |              |          | £      | £ p.m.                  |

### 11.1 Bank Details

|   | Client 1        | Client 2        |
|---|-----------------|-----------------|
| <b>Bank / Building Society</b>                      |                 |                 |
| <b>Address</b>                                      |                 |                 |
| <b>Name(s) of Account Holder(s)</b>                 |                 |                 |
| <b>Sort Code (00-00-00)</b>                         | ( ) - ( ) - ( ) | ( ) - ( ) - ( ) |
| <b>Account Number</b>                               |                 |                 |
| <b>How long have you held this account? (years)</b> | yrs             | yrs             |

## 12 Budget Planner

Please note, that where a new house is being purchased, any house related costs should reflect those of the new property where relevant e.g. council tax. Any changes to desirable expenditure e.g. entertainment should also be considered.

### 12.1 Utility & Other Bills

|                                      | Client 1 | Client 2 | Joint  |
|--------------------------------------|----------|----------|--------|
| <b>Gas / Other Heating</b>           | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Electricity</b>                   | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Water</b>                         | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Telephone / Broadband</b>         | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Digital / Cable TV</b>            | £ p.m.   | £ p.m.   | £ p.m. |
| <b>TV Licence</b>                    | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Council Tax</b>                   | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Ground Rent</b>                   | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Service Charge</b>                | £ p.m.   | £ p.m.   | £ p.m. |
| <b>Utility and Other Bills Total</b> | £ p.m.   | £ p.m.   | £ p.m. |

## 12.2 General Living Costs

|  | Client 1 |             | Client 2 |             | Joint |             |
|--|----------|-------------|----------|-------------|-------|-------------|
| <b>Food</b>  | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Clothing</b>  | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Personal Goods</b> (e.g. toiletries)                        | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Mobile Phone</b>  | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Household Goods</b> (e.g. furniture)                        | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Repairs</b>   | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>School / Child Minding Fees</b>                             | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Entertainment / Recreation</b><br>(inc alcohol and tobacco) | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Holidays</b>  | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Other</b>   | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>General Living Costs Total</b>                              | £        | <b>p.m.</b> | £        | <b>p.m.</b> | £     | <b>p.m.</b> |

## 12.3 Transport

|                                  | Client 1 |             | Client 2 |             | Joint |             |
|----------------------------------|----------|-------------|----------|-------------|-------|-------------|
| <b>Fuel</b>                      | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Road Tax</b>                  | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Insurance</b>                 | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Servicing</b>                 | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Parking</b>                   | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Fares</b> (e.g. travel card ) | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Other</b>                     | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Transport Total</b>           | £        | <b>p.m.</b> | £        | <b>p.m.</b> | £     | <b>p.m.</b> |

## 12.4 Investments & Insurance

|   | Client 1 |             | Client 2 |             | Joint |             |
|---|----------|-------------|----------|-------------|-------|-------------|
| <b>Private Pensions</b>                           | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Insurances</b><br>(eg home, life, pet, travel) | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Savings / Investment</b>                       | £        | p.m.        | £        | p.m.        | £     | p.m.        |
| <b>Investments &amp; Insurance Total</b>          | £        | <b>p.m.</b> | £        | <b>p.m.</b> | £     | <b>p.m.</b> |

## 12.5 Budget

|   | Client 1 | Client 2 |
|---|----------|----------|
| <b>Do you expect your regular outgoings to change significantly in the foreseeable future?</b>  |          |          |
| <b>If yes, please provide details</b>   |          |          |
| <b>What is the maximum monthly payment you are prepared to set to meet your mortgage needs?</b> |          | £        |

## 13 Credit History

|  | Client 1   | Client 2   |
|--|--|--|
| <b>Have you ever had a judgment for debt or a loan default registered against you?</b><br><i>If yes, please provide details in Notes section</i>             | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Have you ever been declared bankrupt or made an arrangement with your creditors?</b><br><i>If yes, please provide details in Notes section</i>            | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Have you ever failed to keep up your payments under any mortgage, rental or loan agreement?</b><br><i>If yes, please provide details in Notes section</i> | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Have you ever had a property repossessed?</b><br><i>If yes, please provide details in Notes section</i>   | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Have you ever a mortgage / loan refused?</b><br><i>If yes, please provide details in Notes section</i>  | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Have you ever had, or do you currently have a payday loan?</b><br><i>If yes, please provide details in Notes section</i>                                  | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| <b>Have you ever been in, or are you currently part of a Debt Management Plan*?</b><br><i>If yes, please provide details in Notes section</i>                | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |

**Notes (please confirm which section they refer to):**

**Please note – if you are not completing the form together with the AIMS broker, there is no need to complete following section as we'll go through these important points together.**

## Mortgage Needs & Preferences

### 1 Client Needs & Circumstances

|  |  |
|--|--|
| <b>Are there any specific requirements or concerns that you have that could influence your choice of mortgage?</b> |  |
|  |  |

|  |  |
|--|--|
| <b>How concerned are you about the possibility of interest rate increases?</b> | Very concerned <input type="checkbox"/> Moderately Concerned <input type="checkbox"/> Not Concerned <input type="checkbox"/> |
| <b>Reason</b>  |  |

### 2 New Mortgage Product Preferences

#### Fixed Rate

|  |  |
|--|--|
| <b>How important is it to have certainty of the exact repayment amount for a period of time?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>If so, over what period?</b>  |  |
| <b>Reason</b>  |  |

#### Variable Rate

|   |  |
|---|--|
| <b>How important is it for the interest rate to be managed by the BoE / LIBOR as opposed to the lender?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>If so, over what period?</b>   |  |
| <b>Reason</b>   |  |

#### Capped Rate

|  |  |
|--|--|
| <b>How important is it to have certainty of the maximum repayment amount for a period of time?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>If so, over what period?</b>  |  |
| <b>Reason</b>  |  |

#### Rate Preferences

|  |  |
|--|--|
| <b>Where you have not indicated any particular preference for a rate type, how important is it to you to secure the lowest total cost over a specified period of time, accepting the rate/payment may fluctuate?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>If so, over what period?</b>  |  |
| <b>Reason</b>  |  |

### Early Repayment Charges

|  |  |
|--|--|
| <b>Do you expect to pay off part, or all, of your mortgage early?</b>            | Yes <input type="checkbox"/> No <input type="checkbox"/>   |
| <b>If yes, please provide details</b>  |  |
| <b>Do you expect to move again?</b>  | Yes <input type="checkbox"/> No <input type="checkbox"/>   |
| <b>If yes, please provide details</b>  |  |
| <b>How important is it to NOT be subject to an Early Repayment Charge (ERC)?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>What is the maximum ERC period you would consider?</b>                        |  |
| <b>Reason</b>  |  |

### 3 New Mortgage Feature Preferences

#### Overpayments

|  |  |
|--|--|
| <b>How important is it to have the facility to make overpayments on your mortgage?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>If so, would up to 10% per annum be sufficient to meet your needs?</b>              | Yes <input type="checkbox"/> No <input type="checkbox"/>   |
| <b>Reason</b>  |  |

#### Underpayments & Payment Holidays

|   |  |
|---|--|
| <b>How important is it to have the facility to make underpayments on your mortgage?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>   |  |

|  |  |
|--|--|
| <b>How important is it to have the facility to take payment holidays on your mortgage?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>  |  |

#### Offset

|   |  |
|---|--|
| <b>How important is it to have the facility to offset your savings against your mortgage?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>   |  |

#### Additional Secured Borrowing

|   |  |
|---|--|
| <b>How important is it to have the facility to borrow additional monies on your mortgage?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>   |  |

## Portability

|   |  |
|---|--|
| <b>How important is it to be able to port your mortgage terms a new property?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>   |  |

## Fees

|  |  |
|--|--|
| <b>Do you have funds available to pay the product / arrangement fees up front?</b> | Yes <input type="checkbox"/> No <input type="checkbox"/>   |
| <b>How important is it to be able to add the fees to the loan?</b>                 | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>  |  |

|  |  |
|--|--|
| <b>Do you have funds available to pay the valuation / booking fees up front?</b> | Yes <input type="checkbox"/> No <input type="checkbox"/>   |
| <b>How important is it for the lender to cover the fees?</b>                     | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>  |  |

|  |  |
|--|--|
| <b>Do you have funds available to pay the legal fees up front?</b> | Yes <input type="checkbox"/> No <input type="checkbox"/>   |
| <b>How important is it for the lender to cover the legal fees?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>  |  |

## Completion Timescales

|   |  |
|---|--|
| <b>How important is it to for the mortgage to be competed as quickly as possible?</b> | Very important <input type="checkbox"/> Moderately important <input type="checkbox"/> Not important <input type="checkbox"/> |
| <b>Reason</b>   |  |

## Declaration

To be completed by all clients. Please read this document carefully before signing.

I confirm that I have provided this information on the understanding that it will be used in the strictest confidence and that it does not place me under any obligation to take up any recommendation that may be made.

|                 | <b>Signature</b> | <b>Date</b> |
|-----------------|------------------|-------------|
| <b>Client 1</b> |                  |             |
| <b>Client 2</b> |                  |             |

## Additional Declaration

If you would like us to keep in touch after we have arranged your mortgage finances we shall need your permission. Please certify your authority for us to contact you with details of mortgages and offers which we believe are likely to be of interest to you by signing the declaration below.

|                 | <b>Signature</b> | <b>Date</b> |
|-----------------|------------------|-------------|
| <b>Client 1</b> |                  |             |
| <b>Client 2</b> |                  |             |