|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | |  | | **Fulwood Wealth Management Ltd**  **9 Brooklands Avenue**  **Fulwood Preston PR2 9SU** |
| **Source:** | | | **Date:** | **Ref:** |
|  | | |  |  |
| **PERSONAL DETAILS** | | | | |
|  | | **First applicant** | | **Second Applicant** |
| **Title (Mr/Mrs/Ms/Other)** | |  | |  |
| **Forename(s) – as per passport** | |  | |  |
| **Surname – as per passport** | |  | |  |
| **Previous surname** | |  | |  |
| **Date of birth** | |  | |  |
| **Are you a smoker?** | |  | |  |
| **Mothers Maiden Name / Town of Birth** | |  | |  |
| **Do you have a valid will?** | |  | |  |
| **Marital status** | |  | |  |
| **Name and date of birth of any dependants** | |  | |  |
| **Nationality / National Insurance Number** | |  | |  |
| **Contact telephone numbers** | **Mobile** |  | |  |
|  | **Work** |  | |  |
|  | **Home** |  | |  |
|  | **Email** |  | |  |
| **3 YEAR ADDRESS HISTORY** | | | | |
| **Current address** | |  | |  |
| **Post code** | |  | |  |
| **Date Moved In** | |  | |  |
| **Current residential status** (homeowner/tenant/other) | |  | |  |
| **Do you have a mortgage on this property?** | |  | |  |
| **Do you own any other properties?** | |  | |  |
| **Previous address** (if less than 3 years at current)  *If more than 1 previous address in the last 3 years please provide these separately* | |  | |  |
| **Date Moved In** | |  | |  |
| **Have you had any CCJ’s?** | |  | |  |
| **Have you ever had defaults?** | |  | |  |
| **Had a mortgage or other loan refused?** | |  | |  |
| **Missed any mortgage or loan repayments in the last 12 months? If so, please provide details.** | |  | |  |
| **EMPLOYMENT DETAILS** | | | | |
| **Job Title** | |  | |  |
| **Employers Name** | |  | |  |
| **Employers Address** | |  | |  |
| **Employers Post code** | |  | |  |
| **Telephone Number** | |  | |  |
| **Fax Number** | |  | |  |
| **Date Commenced Employment** | |  | |  |
| **Is employment permanent?** | |  | |  |
| **Previous employers name and address**  (If current employer less than 3 years) | |  | |  |
| **Date Commenced Employment** | |  | |  |
| **SELF EMPLOYED DETAILS** | | | | |
| **Name of business** | |  | |  |
| **Nature of business** | |  | |  |
| **Business address** | |  | |  |
| **How long has the business been established?** | |  | |  |
| **How long has the business been owned by yourself?** | |  | |  |
| **% of shareholding** | |  | |  |
| **Name and Address of your Accountant** | |  | |  |
| **Telephone number** | |  | |  |
| **Certified/Chartered** | |  | |  |
| **INCOME DETAILS** | | | | |
| **If Employed:** | | | | |
| **Basic Annual Salary** | | **£** | | **£** |
| **Regular overtime** | | **£** | | **£** |
|  | | | | |
| **If Self Employed:** | | | | |
| **Last 3 years taxable income** | | **£** | | **£** |
| **£** | | **£** |
| **£** | | **£** |
| **CURRENT MORTGAGE DETAILS** | | | | |
| **Current monthly mortgage payment** | |  | |  |
| **Name of current mortgage lender** | |  | |  |
| **Current mortgage balance** | |  | |  |
| **Remaining mortgage term** | |  | |  |
| **Current interest rate** | |  | |  |
| **Any early repayment penalties** (if so, provide details) | |  | |  |
| **Mortgage repayment type** | |  | |  |
| **Existing account number** | |  | |  |
| **What do you intend to do with this property?**  **Estimated Value of the Property** | |  | |  |
|  | | | | |
| **Do you have any existing life or critical illness cover?** | |  | |  |
|  | | | | |
| **Have you had any other mortgages in the last 3 years?** (if so, provide details) | |  | |  |
|  | | | | |
| **Name and Address of your bank** | |  | |  |
| **Bank Account Number** | |  | |  |
| **Bank Sort Code** | |  | |  |
| **How long have you held this account?** | |  | |  |
| **PERSONAL & SECURED LOANS** | | | | |
| **Monthly payment and provider** | |  | |  |
| **Outstanding loan amount** | |  | |  |
| **Remaining term** | |  | |  |
| **Interest rate** | |  | |  |
| **Reference** | |  | |  |
|  | | | | |
| **Monthly payment and provider** | |  | |  |
| **Outstanding loan amount** | |  | |  |
| **Remaining term** | |  | |  |
| **Interest rate** | |  | |  |
| **Reference** | |  | |  |
| **CREDIT CARD BALANCES** | | | | |
| **Outstanding balance & provider** | |  | |  |
|  | |  |
|  | |  |
| **Are you liable to pay child maintenance?** | |  | |  |
|  | | | | |
| **Are there any significant changes to either income or expenditure in the foreseeable future?** | |  | |  |
| **PROPERTY TO BE MORTGAGED - DETAILS** | | | | |
| **Purchase Price or Valuation** | |  | |  |
| **Deposit or Equity** | |  | |  |
| **Current loan amount** | |  | |  |
| **New loan amount** | |  | |  |
| **Term required** | |  | |  |
| **Repayment method** | |  | |  |
| **Notes:** | | | | |
| **PROPERTY DESCRIPTION EITHER CURRENT ONE FOR REMORTGAGE OR NEW ONE FOR PROPERTY PURCHASE** | | | | |
| **Property address** | |  | |  |
| **Property post code** | |  | |  |
| **Contact details for valuation, name & number** | |  | | |
|  | | | | |
| **Property type:** | | | | |
| **Number of bedrooms:** | | **No. of bathrooms:** | | **No. of living rooms:** |
| **Number of kitchens:** | | **No. of toilets:** | | **Conservatory:** |
| **Gardens or No. of acres** | | **Year of build:** | | **Parking:** |
| **Any discounts or incentives:** | | **If flat, how many floors:** | | **Leasehold:** |
| **SOLICITOR DETAILS** | | | | |
|  | | | | **Tel No.:** |
| **Fax:** |
| **Email:** |
| **ESTATE AGENT DETAILS or BUILDER IF NEW BUILD** | | | | |
|  | | | | **Tel No.:** |
| **Fax:** |
| **Email:** |
| **DOCUMENTS REQUIRED** | | | | |
| **Please prepare the following documents:** | | | | |
| **Passport and/or driving licence** | |  | |  |
| **Utility bill dated within the last 3 months** | |  | |  |
| **Latest 3 months payslips** | |  | |  |
| **Latest P60** | |  | |  |
| **3 years SA302s** | |  | |  |
| **Latest 3 months bank statements** | |  | |  |
| **NOTES** | | | | |
|  | | | | |