|  |  |  |
| --- | --- | --- |
|  |  | **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** |
|  |