

**Remortgage & Transfer of equity questionnaire & information sheet**

Please complete as fully as possible.

|  |  |  |  |
| --- | --- | --- | --- |
| **All about you** | | | |
|  | **Client 1** | | **Client 2** |
| **Title** |  | |  |
| **Surname** |  | |  |
| **Maiden name**  **(if applicable)** |  | |  |
| **Forenames**  **(inc. middle names)** |  | |  |
| **Date of birth** |  | |  |
| **National Insurance No.** |  | |  |
| **Current address** |  | |  |
| **Correspondence address**  **(if different)** |  | |  |
| **Email address** |  | |  |
| **Home contact no.** |  | |  |
| Can we contact you here and when would be the best times? | Yes/No | | Yes/No |
| **Work contact no.** |  | |  |
| Can we contact you here and when would be the best times? | Yes/No | | Yes/No |
| **Mobile contact no.** |  | |  |
| Can we contact you here and when would be the best times? | Yes/No | | Yes/No |
| **All about the property** | | | |
| **Address of property to be remortgaged and transferred.** | |  | |
| **Property value** | | £ | |
| **Transfer price** | | £ | |
| **Please provide the full names and ages of anyone other than yourselves who will be residing at the property over the age of 17.** | |  | |
| **What completion date do you have in mind?** | |  | |
| **Finally, the finance.** | | | |
| **Is the property currently mortgaged?** | | Yes/No | |
| **If the answer is yes:** | | | |
| **Who is your lender?** | |  | |
| **What is your lenders address?** | |  | |
| **What is your Mortgage Account Number?** | |  | |
| **Approximately how much is outstanding?** | | £ | |
| **Do you have any other loans secured against the property and if so please provide details of their name, address and account number?** | | Yes/No | |
| **Do we have your authority to obtain up to date redemption statements from all the Lenders you have given us details of?** | | Yes/No | |
| **For your new mortgage** | | | |
| **Which lender will you be using?** | |  | |
| **Approximately how much will you be borrowing?** | |  | |
| **Are any balance funds coming from your savings and how much?** | |  | |
| **Are any balance funds coming from a loan or gift from a relative and how much?** | |  | |
| **Which Financial Advisor are you using to arrange your mortgage?** | |  | |
| **Financial Advisor’s address** | |  | |
| **Financial Advisor’s telephone number** | |  | |
| **Who should we speak with there?** | |  | |

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| Signed (Client 1)……………………………………………………..……………. Dated ……………….………  Signed (Client 2)…………………………………………………………………… Dated ……………….……… |
| * If there is more than one purchaser of the property, each one of you must sign this form. * If you need more space, please use another sheet of paper. * If anything changes after you fill in this questionnaire, please tell us immediately. |