

**Purchase questionnaire & information sheet**

Please complete as fully as possible.

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| **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 purchased.** |  |
| **Purchase price** | £ |
| **Does the purchase price include any specific items? If yes, please list.** |  |
| **Have you agreed to purchase anything separately? If yes, please list with price.** |  |
| **Which Estate Agent have you agreed the purchase through?** |  |
| **Estate Agents address** |  |
| **Estate Agents telephone number** |  |
| **Who should we speak with there?** |  |
| **Will you require an independent survey?**(NB. Separate to a mortgage survey if you require a mortgage) | Yes/No |
| **Are you buying the property to live in?** | Yes/No |
| **Please provide the full names and ages of anyone other than yourselves residing at the property over the age of 17.** |  |
| **What completion date do you have in mind?** |  |
| **To assist us in ensuring we do a thorough job for you, please let us know your intentions for the property.**(E.g. Do you intend to build on the property or alter it in any way or let it out at a later date?) |  |
| **Please also let us know if there is anything particularly important which made you choose to purchase the property.**(I.E. A view across countryside or a hot tub in the garden) |  |
| **Do you have any questions you would wish to raise about the property?** |  |
| **Finally, the funding.** |
| **Do you need a mortgage to buy this?** | Yes/No |
| **If the answer is yes:** |
| **Which lender will you likely 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?** |  |
| **If the answer is no:** |
| **Are any funds coming from the sale of a property and how much?** |  |
| **Are any funds coming from your savings and how much?** |  |
| **Are any funds coming from a loan or gift from a relative and how much?** |  |

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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.
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