

**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. |