

Fact Find Questionnaire

| Applicant Details | Client | Partner |
|--|---------------|----------------|
| Title | | |
| Full Name (as shown on your passport) | | |
| Maiden Name & Date Name Changed | | |
| Marital status | | |
| Marriage Anniversary (security question) | | |
| Date of Birth | | |
| Smoker Yes/No | | |
| Relationship to other applicant | | |
| Dependants Yes/No (if yes names & dates of birth) | | |
| National Insurance Number | | |
| Mothers Maiden Name | | |
| Do you have a valid will? Yes / No? | | |
| Current Address & Postcode | | |
| Current residential Status eg owner/rented/family home | | |
| Date Moved into Current Address | | |
| Previous address and postcode (We require <u>full 3</u> year address history) | | |
| Date moved into previous address | | |
| Previous residential status eg owner / rented/family home | | |
| Telephone numbers: Home | | |
| Work | | |
| Mobile | | |
| Email Address: | | |
| Category of Applicant: e.g First Time Buyer, Mover, Remortgage, Right To Buy, Commercial, Buy To Let | | |
| Nationality | | |
| Date moved to UK? | | |
| Visa Status (if applicable) | | |
| Type of Visa (if applicable) | | |
| Term remaining on Visa (if applicable) | | |
| | | |
| | | |
| Employment Details | | |
| Occupation | | |
| Status: Employed/Contract/Self Employed | | |
| Start date of current employment | | |
| Name of Company | | |
| Address of Company | | |

Adrian Knott Partnership (AKP) is a firm of Mortgage Advisers and is authorised and regulated by the Financial Conduct Authority number 300531.
 We hold a Consumer Credit Licence no. 549733 issued by the Office of Fair Trading and registered with the Information Commissioner under the Data Protection Act 1998. Adrian Knott Partnership is the trading name of Knott Another Mortgage Adviser Ltd. Registered in England No: 4997905. Your home is at risk if you do not keep up repayments on a mortgage or other loan secured on it.

TEL: direct: +44 (0) 207 100 1822 | main: +44 (0) 207 396 5556 | mobile: +44 (0) 7968 699 515
FAX: +44 (0) 7092 365 390 **EMAIL:** adrianknott@akpartnership.co.uk

| | | |
|---|---|---|
| Previous employment details – if in current job less than 3 years (start dates if applicable) | | |
| Basic Salary | £ | £ |
| Guaranteed Overtime | £ | £ |
| Regular Bonus | £ | £ |
| Other Income (please specify) | £ | £ |
| Net Monthly Income | £ | |
| Budget for mortgage | £ | |
| Emergency fund balance | | |
| Expected retirement age | | |
| Lending past retirement age? Income to be used into retirement? | | |

| | | |
|--|--|--|
| Bank Details | | |
| Bank Name | | |
| Account Number | | |
| Sort Code | | |
| Account Holder Name & Preferred Payment Date | | |

| | | |
|--|--|--|
| Financial details | | |
| Ever had a loan / mortgage refused?? | | |
| Ever had CCJ's / Defaults registered against you?? | | |
| Ever been declared bankrupt / made arrangements with creditors?? | | |
| Any previous mortgage or rent arrears?? | | |

If yes to any of the above credit issues please provide full details below;

| Type Of Blemish? | Date Registered | Amount? | Satisfied / Paid up to date? | Date satisfied? |
|------------------|-----------------|---------|------------------------------|-----------------|
| | | £ | | |
| | | £ | | |
| | | £ | | |
| | | £ | | |

Committed Outgoing details – Please declare in full or the lender may not provide the full loan amount requested

| App 1 / 2 | Credit card / loan | Lender | Outstanding Balance | Monthly Payment | Interest Rate | To be Repaid on completion? | With this mortgage? |
|-----------|--------------------|--------|---------------------|-----------------|---------------|-----------------------------|---------------------|
| | | | £ | £ | % | | Y / N |
| | | | £ | £ | % | | Y / N |
| | | | £ | £ | % | Y / N | Y / N |
| | | | £ | £ | % | Y / N | Y / N |
| | | | £ | £ | % | Y / N | Y / N |

| | | |
|---------------------------------|---|---|
| Current Mortgage Details | | |
| Lender | | |
| Account Number | | |
| Value of property | £ | £ |
| Amount of Loan outstanding | £ | £ |
| Original Purchase price | £ | £ |

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| | | | |
|--|--|--|---|
| Date Originally purchased | | | |
| Monthly Payment | | £ | £ |
| Years remaining | | | |
| Repayment method (endowment/repayment etc) | | | |
| Rate - Interest Rate & Type of Rate | | | |
| If Buy to Let, expected rental income | | | £ |
| Any penalties to transfer your mortgage, if yes how much? | | £ | |
| Is the current mortgage portable to a new property? | | | |
| Any other properties owned? If yes how many? | | | |
| Property to be mortgaged | | | |
| Address of the property to be mortgaged and postcode | | TBC | |
| How much do you wish to borrow? | | Current Value | |
| Source of funds? (savings / equity / incentive) | | Term of mortgage? | |
| Preferred Product type: eg Fixed/Tracker/Discount | | Tie in period for rate? | |
| Payment method: eg Interest Only, Capital Repayment | | If interest only, please state repayment vehicle? | |
| House/ Bungalow/ Flat ? Semi/Terraced/Detached ? | | Property type: Freehold/Leasehold | |
| IF FLAT – What Floor? | | How many flats in block? | |
| Year Property Built? | | Is this property ex local authority? | |
| No of Bedrooms - | | 2 | |
| Rental Income | | No of reception rooms - 1 | |
| Is property near or above commercial premises? | | Any No Claims Discount for Buildings & Contents? | |
| | | What type of commercial premises? | |
| Solicitors Details (only needed for a full application) | | | |
| Name of Firm | | Accountants Details (if Self employed) (only needed for a full application) | |
| Address | | Name of Firm | |
| Tel No | | Address | |
| Name of Contact | | Tel No | |
| | | Name of Contact | |
| Selling Agents (if purchase) (only needed for a full application) | | | |
| Name of Firm | | | |
| Address | | | |
| Tel No | | | |
| BUDGET PLANNER | | | |

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| c | | CREDIT COMMITMENTS | |
|-------------------------|---|-----------------------------|----------|
| Council Tax | £ | Secured Loans | £ |
| Electric | £ | Credit Cards (total p/m) | £ |
| Gas | £ | Personal Loans (total p/m) | £ |
| Water | £ | Hire Purchases (total p/m) | £ |
| Tv / Internet | £ | Overdrafts | £ |
| Telephone / Mobiles | £ | | |
| | | OTHER | |
| PROTECTION | | Food (total p/m) | £ |
| Buildings & Contents | £ | Social (total p/m) | £ |
| Life & Critical Illness | £ | Gym / health club | £ |
| Income Protection | £ | Maintenance payments | £ |
| | | Childcare | £ |
| CAR COSTS | | Mortgage / rent to continue | £ |
| Finance | £ | other | £ |
| Insurance | £ | | |
| Petrol | £ | TOTAL | £ |
| Other travel costs | £ | | |
| | | | |

FURTHER INFORMATION (please fill in accordingly)

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DECLARATION

Information given on this form, consisting of pages one, two, three, and four will be looked at in detail and will help us make an assessment and recommendations as to whether we are able to consider you further for a mortgage application. It will also form the basis of our advice and recommendations going forward. This information will be held on computer and is subject to the Data Protection Act. We will make a credit search at one or more credit reference agencies who will supply us with credit information for use in the assessment and other information, including information from the Electoral Register for the purpose of verifying identity. The credit reference agency(s) will record details of the search whether or not this matter proceeds further. Recorded credit searches may be used by us and other companies when making credit decisions and may therefore affect the ability of the applicant to obtain credit for this application and in the future? If this application in principle is made in joint names, and a credit search is made, an "association" between the joint applicants will be created. This financial association may be taken into account by us and other lenders in future applications for credit or financial services. The association will remain until an applicant successfully applies for "disassociation" with the credit reference agency(s)? • Information held about the applicant(s) by the credit reference agency(s) may already be linked to records relating to other financial partners (which may include persons other than the applicant(s)). This application will be assessed with reference to any "associated" records? • (Mortgages only). You hereby authorise Adrian Knott Partnership (AKP) to make enquires and request any references as AKP consider necessary in connection with making a mortgage application, whether of your employer(s) or otherwise and you authorise such persons to give this information to AKP? • (Mortgages only). You authorise AKP to pass, at its discretion, any such information obtained to mortgage lenders (lenders). You give permission to lenders to conduct credit searches about you. You accept that credit reference agencies keep a record of all credit searches whether or not you proceed to make a mortgage application. You accept that lenders may use credit-scoring methods to assess your status and to verify your identity. You accept that credit searches and other information provided to lenders and/or the credit reference agencies, about you and those with whom you are linked financially may be used by lenders and other companies if credit decisions are made about you or other members of your household. You also authorise AKP to access information held by a lender related to a mortgage application made by you as a result of a service provided by AKP?

In the absence of being able provide a wet signature, please indicate here by filling in your name that you are happy with the declaration above.

| | | |
|------------|--------|--------|
| Signatures | X..... | X..... |
|------------|--------|--------|

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