

ENQUIRY FORM

Introducer name		T	
Company		M	
Address		E	
		Date	

CLIENT PROFILE

Name		Age(s)		T	
Address				M	
				E	
Occupation	Employed <input type="checkbox"/> Self Employed <input type="checkbox"/>		Income	£	
Are accounts available?	Yes <input type="checkbox"/> No <input type="checkbox"/>	How many years?		Net Profit Shown?	£
CCJs/defaults?	Yes <input type="checkbox"/> No <input type="checkbox"/>	How many?		How much?	£
				Date issued	
Mortgage arrears?	Yes <input type="checkbox"/> No <input type="checkbox"/>			How much?	£
				Date issued	
Residential mortgage	Yes <input type="checkbox"/> No <input type="checkbox"/>		First time buyer	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Residential property value	£	Equity	£	LTV	£
Client description					

PROPERTY PROFILE

Property address			Freehold <input type="checkbox"/> Leasehold <input type="checkbox"/>
	If Refinance, Exact Date of Purchase		
	If leasehold, term remaining		years
Property description			
Intended use / Is Planning Required?			
Going concern	Yes <input type="checkbox"/> No <input type="checkbox"/>	Investment Property <input type="checkbox"/>	Owner Occupied <input type="checkbox"/>
		Development <input type="checkbox"/>	

TYPE OF MORTGAGE

PURCHASE

Purchase price	£	Value	£	Loan required	£	LTV	%
Deposit	£	Bricks & Mortar valuation	£	Goodwill	£		
From where?							

REFINANCE / REMORTGAGE

Current value	£	Current lender	
Current loan	£	Reason for remortgage	
Date of Purchase		Price at Purchase	
Work Done Since	Yes <input type="checkbox"/> No <input type="checkbox"/>	What has been done	

DEVELOPMENT FINANCE

Site cost	£	Build cost	£
Client's past building experience			

GENERAL NOTES

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