

## Confidential Fact Find & Mortgage/Loan Application Data Capture Form

### Purpose of this application:

Yes

No

To purchase or refinance a **residential** owner occupied or Buy to Let/investment property

☐

Have you completed & attached a **Residential & BTL Loan Enquiry**

☐

To purchase or refinance a **commercial** or semi commercial trading premises or investment property

☐

Have you completed & attached a **Commercial Loan Enquiry**.

☐

To purchase or refinance an owner occupied or Buy to Let/Investment property using a **bridging/short term loan**.

☐

Have you completed & attached a **Decision in Principle (Bridging & Short-Term Loans)**

☐

You must complete one of the above enquiry forms in addition to this application

### Important information:

This Confidential Fact Find & Mortgage/Loan Application Data Capture Form will be used to assist us in completing the lenders application forms for you. Before completing & signing this document, you must ensure & confirm you have received a copy of our Terms of Business (information about our services), a copy of our Privacy Policy Statement and you have read and understand the content of these. In addition to this form, you will need to complete, if you haven't already done so, one of our enquiry forms created specifically to capture the data for the purpose of mortgage/loan you are applying for. You may need to provide additional information and documentation to support your application and you will be advised of these requirements during the application process. When a lender application has been completed on your behalf, a copy will be sent to you for checking and signing, please ensure you read the lender's declaration carefully and ensure you understand this before signing. The lender may issue additional documentation, agreements, terms and contracts which may need to be signed. These should be read carefully and understood before doing so. Do not sign anything you do not fully understand and seek professional advice if you need to. Please ensure you understand the risks involved in taking out a mortgage or loan secured against a property and take the appropriate legal advice before you enter into such a transaction. Please ensure you also take appropriate advice from qualified tax advisers, planning consultants, quantity surveyors, chartered engineers, valuers & surveyors and other qualified professionals that may need to be involved with your particular proposition. It is your responsibility to ensure you can afford any mortgage or loan you agree to. The information you provide to us, the lender or any third party connected with this application must be true, accurate and may need to be evidenced.

**YOUR HOME OR PROPERTY MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS  
ON ANY MORTGAGE OR LOAN SECURED AGAINST IT.**

### For office use only:

Client name:

Co. Name:

Customer ref. no.

Broker name:

Date started:

Independent Financial Advisers and mortgage brokers are required to have proper regard for a client's best interests in any advice given. They must therefore do their utmost to ensure that they are aware of your financial circumstances so that their advice is the most suitable for your needs. The questions here have been specifically designed to help your adviser provide advice that meets your needs. If, for any reason, you decline to answer any, or all the questions or, if you fail to provide true and accurate information to the best of your knowledge, the advice given subsequently may not be best advice, as it can only be based on the information provided in this and accompanying documents.

	Applicant 1:				Applicant 2:					
Title: (Mr, Mrs, Ms, Miss, Dr, other)										
First Name/s:										
Middle name/s:										
Surname:										
Previous, other or maiden name:										
Date: (change of name)										
Date of birth:										
Gender:										
Married/Civil Status:										
Place of birth:										
Nationality:										
Country of residence:										
Relationship to other applicant/s:										
National insurance no.:										
Expected retirement/state pension age:			State pension age				State pension age			
Present home address & full postcode:										
Residential status: (owner, tenant, living with parents, other)										
Date moved to current address:										
Home telephone no.:										
Mobile telephone no.:										
Work telephone no.:										
Email address:										
Contact method: (i.e., email/phone & preferred time)										
If renting, how much do you pay?	£		per		£		per			
Are you on the electoral role there?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>		
Are you in good health?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>		
Do you have religious beliefs? (mortgage related)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>		
Have you smoked or used any tobacco, nicotine replacement products or e-cigarettes in the last 12 months	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>		
Provide more information here if required:										

Occupier:	Full address & postcode:	Date moved in:	Date Moved out:

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**Employment:**

Type of employment:

Applicant 1:				Applicant 2:			
Employee	<input type="checkbox"/>	Employer	<input type="checkbox"/>	Employee	<input type="checkbox"/>	Employer	<input type="checkbox"/>
Salaried	<input type="checkbox"/>	Director	<input type="checkbox"/>	Salaried	<input type="checkbox"/>	Director	<input type="checkbox"/>
Sole trader	<input type="checkbox"/>	Partnership	<input type="checkbox"/>	Sole trader	<input type="checkbox"/>	Partnership	<input type="checkbox"/>
Ltd. Co.	<input type="checkbox"/>	Shareholder	<input type="checkbox"/>	Ltd. Co.	<input type="checkbox"/>	Shareholder	<input type="checkbox"/>

Occupation, job title, job description:

If shareholder, current shareholding:

Are you full time or part time?

Full time	<input type="checkbox"/>	Part time	<input type="checkbox"/>	Full time	<input type="checkbox"/>	Part time	<input type="checkbox"/>
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Name of employer or business name:

Company registration number:

UK incorporated:

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Trading address of employer or business:

Type of business / industry:

Date employment commenced:

**Additional employment:**

Type of employment:

Occupation, job title, job description

If shareholder, current shareholding

Are you full time or part time?

Full time	<input type="checkbox"/>	Part time	<input type="checkbox"/>	Full time	<input type="checkbox"/>	Part time	<input type="checkbox"/>
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Name of employer or business name:

Company registration number:

UK incorporated:

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Trading address of employer or business:

Type of business / industry:

Date employment commenced:

**Previous employment:**

Type of employment:

Occupation, job title, job description

If shareholder, previous shareholding

Were you full time or part time?

Full time:	<input type="checkbox"/>	Part time:	<input type="checkbox"/>	Full time:	<input type="checkbox"/>	Part time:	<input type="checkbox"/>
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Name of employer or business name:

Company registration number:

UK incorporated:

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Trading address of employer or business:

Type of business / industry:

Date employment commenced:

Date employment ceased:

**Professional connections:**

Solicitor/legal representative:

Corporate tax advisers:

Business accountant:

Contact name:

Business name:

Business address &amp; postcode:

Office telephone no.

Mobile telephone no.

Email address:

DX no.:

**Other advisers:**

	Estate agent/Sourcing agent:	Financial advisers:	Mortgage broker:
Contact name:			
Business name:			
Business address & postcode:			
Office telephone no.			
Mobile telephone no.			
Email address:			

**Bankers:**

	Personal bank account:	Business bank account:	Savings/other bank account:
Bank name:			
Name on the account:			
Account No.			
Sort code:			
Bank address & postcode:			

**Income:**

	Applicant 1:				Applicant 2:			
	Amount received per:	Year	Month	Week	Amount received per:	Year	Month	Week
Basic salary: (evidenced on payslip)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guaranteed overtime / bonus:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regular overtime / bonus:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regular commission:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State pension income:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Private / other pension income:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State benefits: (please provide breakdown in notes)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other income: (please provide breakdown in notes)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Landlord gross rental income: (last year)	£				£			
Ltd. Co. dividends: (latest accounting year)	£	<input type="checkbox"/>	<input type="checkbox"/>		£	<input type="checkbox"/>	<input type="checkbox"/>	
Ltd. Co. dividends: (previous accounting year)	£	<input type="checkbox"/>	<input type="checkbox"/>		£	<input type="checkbox"/>	<input type="checkbox"/>	
Net profit:	£			Tax year:	£			Tax year:
(Last three years returns. Provide annual net profit and the tax year it relates to)	£			Tax year:	£			Tax year:
	£			Tax year:	£			Tax year:
Net take home pay from all sources:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Expenditure:**

	Applicant 1:	Year	Month	Week	Applicant 2:	Year	Month	Week
Current mortgage or rent:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Current insurance payments:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Current pension contributions:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alimony payments:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance for dependants:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Utilities: (gas, electric, water, other fuels)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TV/satellite/broadband/telephone landline:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile phone:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Council tax:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food/living expenses: (clothing/personal/household)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childcare, school & education fees:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground rent & property maintenance:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Essential travel costs: (commuting)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional travel costs:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holidays:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Socialising & leisure activities:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regular savings and investments:	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: (please provide details in the notes)	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Totals:	£				£			

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Have you ever had a mortgage or loan application refused or declined for any reason?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever had a judgement for debt, or a loan default registered against you?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever been declared bankrupt, in debt management or made an arrangement with creditors?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever missed or made late regular payments on any credit or loan agreement?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever failed to keep up payments on current or previous mortgage, loan or rental agreement?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If any applicant has answered yes to any question above you will need to provide further details and a copy of your credit reports

**Ltd Co/LLP applications:**

Company name:				Co. registration no.	
	Director/Shareholder 1:	Director/Shareholder 2:	Director/Shareholder 3:	Director/Shareholder 4:	
Full name:					
Position:					
Shareholding:					
Nationality:					
Country of residence:					

All directors & shareholders will need to complete a separate Fact Find/application form

**Parental/Guarantor assisted applications:**

	Parent/Family Member/Guarantor 1:	Parent/Family Member/Guarantor 2:
Full name:		
Relationship:		
Date of Birth:		
Nationality:		
Country of residence:		

All parents, family member, guarantors, will need to complete a separate Fact Find/application form

**Vendors gift applications:** (Including inter family purchases & landlords)

Company name: (if applicable)		
	Vendor 1:	Vendor 2:
Full name:		
Relationship:		
Home address & full postcode:		
Nationality:		
Country of residence:		
Nature of gift: (please detail amount of gift and means i.e., cash, equity/discounted sale, other)		

**Risks:**

Buying any property and arranging finance in order to do so involves taking a risk. Engaging us as your brokers to assist with your application does not completely mitigate all the risks associated with this process as many of these can be outside our control. If the mortgage is regulated then you are offered some protection against financial losses if you can evidence you have been misled or poorly advised by a regulated broker or a lender. If the mortgage is unregulated, then you forego this protection.

- When we introduce a lender to you we cannot be held responsible for any decisions they make. This also includes time delays incurred or change of policy decisions that a lender (or any other associated professional or third party) make in relation to you or your application. A lender can also withdraw a loan offer at any time, and they can issue a notice for a mortgage to be repaid on demand if they have a valid reason to do so.
- Valuers instructed by the lenders are working on the lenders behalf whether you have paid for that valuation or not. We cannot be held responsible for the decisions they make or their professional opinion of the value of your current/proposed property.
- If, in the valuer's opinion, further inspections or reports are required to assess the condition of the property, we or the lender cannot be held responsible for the purpose of this report or the additional costs you may incur.
- We do not engage the services of estate agents and cannot be held responsible for their actions if they withdraw the property or change any terms or conditions of the purchase.
- We do not recommend solicitors (but we can instruct on your behalf if asked to do so). They are not employed by us and therefore, we are not responsible for their delays, or any action or decisions they make in relation to the services they have offered you.
- The type of mortgage/loan being applied for must be appropriate for the purpose, and you must tell us, and the lender, of your true intentions. If you do not, then you may be intentionally or unintentionally be committing mortgage fraud.
- If you borrow money secured against a property for any purpose other than to purchase that property you must ensure the reason to do so is legal and acceptable to the lender.
- You must ensure you have the means to repay the mortgage within the agreed term.
- You must ensure you make adequate provision to maintain your mortgage payments on time and make suitable provision to continue these payments or repay the mortgage if you are unable to do so for any reason.

By returning this form, you acknowledge you have read this document thoroughly and fully understand the risks associated with buying property and applying for mortgage/loan finance.

**Product preferences:**

	Yes	No										
Do you want fixed mortgage rate for a certain period?	<input type="checkbox"/>	<input type="checkbox"/>	< 2 years	<input type="checkbox"/>	2 + years	<input type="checkbox"/>	3 + years	<input type="checkbox"/>	5 + years	<input type="checkbox"/>	10 + years	<input type="checkbox"/>
Do you want a Bank Base Rate tracker mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	< 2 years	<input type="checkbox"/>	2 + years	<input type="checkbox"/>	3 + years	<input type="checkbox"/>	5 + years	<input type="checkbox"/>	10 + years	<input type="checkbox"/>
Do you want a lender rate discounted mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	< 2 years	<input type="checkbox"/>	2 + years	<input type="checkbox"/>	3 + years	<input type="checkbox"/>	5 + years	<input type="checkbox"/>	10 + years	<input type="checkbox"/>
Do you want a cashback (initial sum) mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/detail									
Are you happy to pay higher lending fees?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/detail									
Do you have a deadline completion date?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/timescale									
Would you accept a tie in on a preferential rate?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/detail									
Do you want lenders fees added to the loan?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/timescale									
Do you plan to pay off all or part of the mortgage during the preferential rate period?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/timescale									
Are you likely to move home during the preferential rate period of the mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/timescale									
Do you need the mortgage repaid on or before you retire from working?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/detail									
Do you want to keep your existing mortgage term?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/detail									
Do you want to guarantee the mortgage is repaid by the end of the term?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/timescale									
Might your household income or expenditure change significantly with the foreseeable future?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/timescale									
Do you have any concerns about interest rate movements?	<input type="checkbox"/>	<input type="checkbox"/>	Reason/detail									
Do you fully understand the risks associated with taking an interest only mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	Detail									
Do you understand the risks associated with consolidating unsecured debt into this mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	Detail									
Will you make your own arrangements to repay the mortgage at the end of the term?	<input type="checkbox"/>	<input type="checkbox"/>	Detail									

**Repayment strategy and protection:**

	Yes	No	Please provide a brief outline of your current arrangements
Will this mortgage be repaid in full should any applicant lose their life during the term of the loan?	<input type="checkbox"/>	<input type="checkbox"/>	
Will this mortgage be repaid in full should any applicant suffer a serious or debilitating illness or condition?	<input type="checkbox"/>	<input type="checkbox"/>	
Will you be able to maintain the mortgage payments if any applicant cease to be gainfully employed?	<input type="checkbox"/>	<input type="checkbox"/>	
Will you be able to maintain the mortgage payments if any applicant suffer sickness or disability?	<input type="checkbox"/>	<input type="checkbox"/>	

**Estate planning:**

	Yes	No	Please provide a brief outline of your current arrangements
Do you have a written <u>Will</u> , is it up to date, and is it kept in a secure place?	<input type="checkbox"/>	<input type="checkbox"/>	
Has this <u>Will</u> been reviewed within the last 5 years?	<input type="checkbox"/>	<input type="checkbox"/>	

**Additional services:**

	Yes	No
Do you need our assistance to find solicitors or conveyancers who have experience with the type of mortgage you are applying for?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need our assistance to find suitable accountants or tax advisers experienced in property related advice?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need quotes or guidance to arrange suitable life, critical illness and/or sickness and disability insurance?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need quotes or guidance to arrange suitable building & contents insurance or professional landlord's cover?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need our assistance to find a suitable professional who could advise you on retirement planning and/or long-term investment?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any other financial requirements you feel we may be able to help with? (if yes, provide more details below)	<input type="checkbox"/>	<input type="checkbox"/>

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**Consent authority:**

Please provide names, details and your consent of those we may need to contact on your behalf to obtain the information we require to assist with your application for a mortgage or loan.

Please provide consent and contact details for:

Name:	<input type="text"/>	<b>I give my authority for you to provide any information requested by W. P. Property Finance on my behalf.</b>	Name:	<input type="text"/>
Position:	<input type="text"/>		Signature:	<input type="text"/>
Company:	<input type="text"/>			
Address	<input type="text"/>			
Contact No.	<input type="text"/>		Date:	<input type="text"/>
Email:	<input type="text"/>	Ref/Account no/s:	<input type="text"/>	

Please provide consent and contact details for:

Name:	<input type="text"/>	<b>I give my authority for you to provide any information requested by W. P. Property Finance on my behalf.</b>	Name:	<input type="text"/>
Position:	<input type="text"/>		Signature:	<input type="text"/>
Company:	<input type="text"/>			
Address	<input type="text"/>			
Contact No.	<input type="text"/>		Date:	<input type="text"/>
Email:	<input type="text"/>	Ref/Account no/s:	<input type="text"/>	

Please provide consent and contact details for:

Name:	<input type="text"/>	<b>I give my authority for you to provide any information requested by W. P. Property Finance on my behalf.</b>	Name:	<input type="text"/>
Position:	<input type="text"/>		Signature:	<input type="text"/>
Company:	<input type="text"/>			
Address	<input type="text"/>			
Contact No.	<input type="text"/>		Date:	<input type="text"/>
Email:	<input type="text"/>	Ref/Account no/s:	<input type="text"/>	

Please provide consent and contact details for:

Name:	<input type="text"/>	<b>I give my authority for you to provide any information requested by W. P. Property Finance on my behalf.</b>	Name:	<input type="text"/>
Position:	<input type="text"/>		Signature:	<input type="text"/>
Company:	<input type="text"/>			
Address	<input type="text"/>			
Contact No.	<input type="text"/>		Date:	<input type="text"/>
Email:	<input type="text"/>	Ref/Account no/s:	<input type="text"/>	



**Notes:**

Please use this space to record any further information that you feel would be important to us or the lender that may not have been recorded in this and the accompanying enquiry forms we have provided. Any advice we provide on regulated mortgage products **will only** be based on information in these documents.

**Disclaimer:**

This Confidential Fact Find & mortgage/loan application data capture form has been designed to capture the information we need in order to offer advice to you. Advice will only be offered after you have read, accepted, and signed our terms of business. It will be used in conjunction with other forms and documentation requested which will vary according to the nature of your needs and enquiry. The advice given, will only be based on the information you provide in these documents. Any advice we provide to you will be offered in good faith based on our understanding and knowledge of the marketplace at the time. Any mortgage rates discussed or offered are not guaranteed, any quotes provided will only be valid on the day they are issued. Lender's criteria can change at any time; therefore, we cannot guarantee you will be accepted for any loan or mortgage based on this information and cannot be held responsible for any decisions made by any lender. All regulated firms will carry out their own background checks on the validity of any information provided and suspicious activity will be reported to the appropriate authorities.

**Declaration & Signatures:**

	Applicant 1:			Applicant 2:		
I/we confirm that the information provided in this document is true, accurate and can be evidenced.	Full name:	<input type="text"/>			<input type="text"/>	
	Signature:	<input type="text"/>	X	X	<input type="text"/>	X
	Date:	<input type="text"/>			<input type="text"/>	

W P Property Finance is the trading name of Positive Property Finance Ltd. First Floor, Media House, 3 Threshelfords Business Park, Inworth Road, Feering, Essex. CO5 9SE  
Tel. No. 01206 586580 which is authorised and regulated by the Financial Conduct Authority under FCA reference number: 702870.

Additional space: