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Confidential Fact Find								
&								
Mortgage/Loan Applicatio	on Data	a 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 a	ddition 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:					

Financial Services and Markets Act 2000

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.

Personal & contact details:		Applicant 1:				Applicant 2:			
Title:		Аррис	ant 1.			Аррис	ant Z.		
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:				1					
Residential status:									
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		No		Yes		No		
Are you in good health?	Yes		No		Yes		No		
Do you have religious beliefs? (mortgage related)	Yes		No		Yes		No		
Have you smoked or used any tobacco, nicotine replacement products or e-cigarettes in the last 12 months	Yes		No		Yes		No		
Provide more information here if required:									
	1								

Previous address/s: (please provide 3 years address history)									
Occupier:	Full address & postcode:	Date moved in:	Date Moved out:						

Dependants:						
Dependant of:	Dependant's full name:	Date of birth:		Living w	ith you:	
			Yes		No	
			Yes		No	
			Yes		No	
			Yes		No	
			Yes		No	
			Yes		No	
			Yes		No	
			Yes		No	

Type of employment: Simployment:	Employment:									
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Are got all time or part time Full time Part time Part time Part time Name of employer or business name: Company registration number: No Yes	Occupation, job title, job description:							_		
Are got all time or part time Full time Part time Part time Part time Name of employer or business name: Company registration number: No Yes	If shareholder, current shareholding:									
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Type of business / industry:							1			
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UK incorporated: Yes No Yes No Trading address of employer or business:										
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If shareholder, previous shareholding Were you full time or part time? Name of employer or business name: Company registration number: UK incorporated: Yes No Yes Solicitor/legal representative: Corporate tax advisers: Business address & postcode: Yes <	Type of employment:									
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Name of employer or business name:	If shareholder, previous shareholding									
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Trading address of employer or business: Type of business / industry: Date employment commenced: Date employment ceased: Date employment ceased: Professional connections: Solicitor/legal representative: Contact name: Business name: Business address & postcode: Office telephone no. Mobile telephone no. Mobile telephone no. Email address: Imail address:	UK incorporated:		Yes		No		Yes		No	
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Solicitor/legal representative:Corporate tax advisers:Business accountant:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Business name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Business address & postcode:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Office telephone no.Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax advisers:Contact name:Image: Corporate tax advisers:Image: Corporate tax advisers:Image: Corporate tax	Professional connections:									
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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)	£				£			
Guaranteed overtime / bonus:	£				£			
Regular overtime / bonus:	£				£			
Regular commission:	£				£			
State pension income:	£				£			
Private / other pension income:	£				£			
State benefits: (please provide breakdown in notes)	£				£			
Other income: (please provide breakdown in notes)	£				£			
Landlord gross rental income: (last year)	£				£			
Ltd. Co. dividends: (latest accounting year)	£				£			
Ltd. Co. dividends: (previous accounting year)	£				£			
Net profit:	£		Ta	ax year:	£		Та	x year:
(Last three years returns. Provide annual net profit and the tax year it relates to)	£		Ta	ax year:	£		Та	x year:
profit and the tax year it relates to	£		Ta	ax year:	£		Та	x year:
Net take home pay from all sources:	£				£			

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

Non-property assets: (say	Non-property assets: (saving & investments)									
Owner:	Asset type:	Provider:	Date started:	Asset Value:	Annual Income:					
				£	£					
				£	£					
				£	£					
				£	£					
				£	£					
				£	£					
				£	£					
				£	£					
				£	£					
				£	£					

Unsecured liabilities: (loans & credit cards)										
Owner:	Liability type:	Provider/lender:	Current debt:	Cost pm:	End date:	Cons	olidate	d into l	oan?	
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		
			£	£		Yes		No		

Property Assets, owner-occupied property: (including 2nd homes, family homes, holiday homes etc.)										
Owner:	Current value:	Mortgage o/s:	Net value:	Lender:	Ann. Inc.: (if let)	Postcode + name/no.& street:				
	£	£	£		£					
	£	£	£		£					
	£	£	£		£					
	£	£	£		£					
	£	£	£		£					
	£	£	£		£					

Buy to let prope	rty: (portfolio landl	ords, those owning 3	3 or more mortga	ged properties, should prov	vide a detailed por	tfolio spreadsheet)
Owner:	Current value:	Mortgage o/s:	Net value:	Lender:	Ann. rental inc.:	Postcode + name/no.& street:
	£	£	£		£	
	£	£	£		£	
	£	£	£		£	
	£	£	£		£	
	£	£	£		£	
	£	£	£		£	

Other secured mort	gages/loans:								
Owner:	Liability type:	Provider/lender:	Current debt:	Cost pm:	End date:	Cons	olidate	d into l	oan?
			£	£		Yes		No	
			£	£		Yes		No	
			£	£		Yes		No	
			£	£		Yes		No	
			£	£		Yes		No	
			£	£		Yes		No	

Credit profile:		Applic	ant 1:			Applic	cant 2:	
Have you ever had a mortgage or loan application refused or declined for any reason?	Yes		No		Yes		No	
Have you ever had a judgement for debt, or a loan default registered against you?	Yes		No		Yes		No	
Have you ever been declared bankrupt, in debt management or made an arrangement with creditors?	Yes		No		Yes		No	
Have you ever missed or made late regular payments on any credit or loan agreement?	Yes		No		Yes		No	
Have you ever failed to keep up payments on current or previous mortgage, loan or rental agreement?	Yes		No		Yes		No	
If any applicant has answered yes to any question above you will need to provide further de	etails ar	id a coj	by of yo	our cre	dit repo	orts		

Ltd Co/LLP application	ons:			
Company name:			Co. registration no.	
L	Director/Shareholder 1:	Director/Shareholder 2:	Director/Shareholder 3:	Director/Shareholder 4:
Full name:				
Position:				
Shareholding:				
Nationality:				
Country of residence:				
	All directors & shareho	Iders will need to complete a sepa	rate Fact Find/application form	
Parental/Guarantor	assisted applications:			
	Parent/Family M	ember/Guarantor 1:	Parent/Family Men	nber/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 for	m
	tions: (Including inter family pur	chases & landlords)		
Company name: (if applic				
	Ver	ndor 1:	Vende	or 2:
Full name:				
Relationship:				
Home address & full				
postcode:				
Nationality:				
Country of residence:				
Nature of gift: (please de	tail amount of gift and means i.e.,	cash, equity/discounted sale, oth	er)	

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 loses 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 C Zes 3+ Ses Ses Use + Do you want a take base Nate tracker mortgage? C Zes Zes Ses Ses Use + Do you want a take base Nate tracker mortgage? C Zes Zes Ses Use + Use + <th></th> <th>1</th>											1
Do you want a Bank Base Rate tracker mortgage? yze		Yes	No								
Do you want a londer rate discounted mortgaps? , s2 2.4 3.4 5.4 0.4 Do you want a cathback (initial sum) mortgaps? , s2 years years years years Do you want a cathback (initial sum) mortgaps? , s2 , years years years years Do you want a cathback (initial sum) mortgaps? , sacon/directal , sacon/directal , sacon/directal Do you have a dataline completion date? , sacon/directal , sacon/directal , sacon/directal Do you have a dataline completion date? , sacon/directal , sacon/directal , sacon/directal Do you have a dataline completion date? , sacon/directal , sacon/directal , sacon/directal Do you and the outer fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal , sacon/directal , sacon/directal Do you want bender fields of the mortgaps , sacon/directal	Do you want a Bank Base Rate tracker mortgage?			< 2 2 +		3 +		5 +		10 +	
Do you want a cashback (initial sum) mortgage? Presson/detail Are you happy to pay higher lending fess? Presson/detail Provide a deudine completion dute? Presson/detail	Do you want a lender rate discounted mortgage?			< 2 2 +		3 +		5 +	_	10 +	
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Consent authority:	
Please provide names, details and your consent of those we may need to co application for a mortgage or loan.	ontact on your behalf to obtain the information we require to assist with your
Please provide consent and contact details for:	
Name:	I give my authority for you to provide any information requested by W. P. Property Finance on my behalf.
Contact No. Email:	Date: Ref/Account no/s:
Please provide consent and contact details for:	
Name:	I give my authority for you to provide any information requested by W. P. Property Finance on my behalf. Name: Signature: X Date: Ref/Account no/s:
Please provide consent and contact details for:	
Name:	I give my authority for you to provide any information requested by W. P. Property Finance on my behalf. Name: Signature: X Date: Ref/Account no/s:
Please provide consent and contact details for:	
Name: Position: Company: Address	I give my authority for you to provide any information requested by W. P. Property Finance on my behalf. Name: Signature: X
Contact No. Email:	Date: Ref/Account no/s:

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: Signature:) Date:	<	хх		X
	-	ne of Positive Property Finance Ltd. East Bridge Hous rised and regulated by the Financial Conduct Author	•		

Additional space
