

RE-MORTGAGE QUESTIONNAIRE

Dear Client

This questionnaire gives us the information required to commence dealing with your instructions. The information will assist us to deal with your matter as efficiently as possible.

Please complete sections 1 and 2 then sign and date the form where indicated before returning to us.

For marketing purposes would you please complete the following:-

How did you hear about Whitehead Monckton?

Yellow Pages

Advert

Recommendation
By whom?.....

Other
Please state.....

Section 1 – General

1. (a) The **FULL** first names and surname(s) in which you existing property (if any) is held.
.....

(b) The **FULL** first names and surname(s) in which the new mortgage is to be made.
.....

2. Address for correspondence
.....

3. Telephone number(s) where you can be contacted:
Home:
Business:
Mobile:

4. Date of birth of all parties.
.....

5. National insurance number of all parties
.....

6. (a) Have you made a Will?
It is important that this point is considered carefully, both in regard to the property holding implications between spouses and secondly in regard to inheritance and capital gains tax planning
YES/NO

(b) If not, would you like one of our advisors to contact you regarding this?
YES/NO

7. Whitehead Monckton has its own in-house independent financial advice department, which is not tied to banks, building societies or investment houses. As part of our service, from the details provided, we may send you information on various products that we consider may be of interest to you.

If you do not wish to receive this information please tick the box

Are you a smoker or a non-smoker?

If you are looking to invest proceeds from your transaction, our own in-house Independent Financial Adviser offers a free of charge initial consultation and will write to you to introduce himself. Please tick the box if you do **not** wish to be contacted.

Please enclose a cheque for £100.00 made payable to Whitehead Monckton in respect of the initial expenses. All monies paid and not used on your behalf will be credited to your account.

- (a) I/we authorise Whitehead Monckton to act in this transaction.
- (b) Other solicitors have not been instructed.
- (c) The replies set out in this questionnaire are correct.
- (d) I/we authorise Whitehead Monckton to give third parties any information requested in connection with the transaction.

Signed.....

Signed.....

Dated.....

Section 2 – Re-mortgage

- 1. The **FULL** address of the property to be re-mortgaged including postcode.
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- 2. Regarding the existing mortgage, please supply:-
 - (a) Name of Building Society/Lender.

 - (b) Address.
.....

 - (c) Account/Roll No. (this is most important)

 - (d) Approximate amount outstanding on your present mortgage. £.....

- 3. If there is money due to any other organisation, e.g. for home improvements, please supply:-
 - (a) Name of Lender.

 - (b) Address.
.....

 - (c) Account/Roll No.

 - (d) Approximate amount outstanding. £.....

PLEASE NOTE THAT ALL LOANS ON THE PROPERTY MUST BE RE-PAID ON COMPLETION

- 4. Please indicate whether the property is Freehold of Leasehold.

- 5. If you have married since you purchased this property please let us borrow your Marriage Certificate.

6. With regard to the new mortgage, please state:-

(a) Name and address of the Lender.

.....
.....
.....

(b) Name and address of Broker (if any).

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.....
.....

(c) Amount of mortgage you have applied for.

£.....

(d) Is the mortgage a re-payment or endowment mortgage?

.....

(e) What is the term of the mortgage?

.....

PLEASE NOTE IF YOUR PROPERTY IS IN JOINT NAMES THE MORTGAGE MUST ALSO BE IN JOINT NAMES.

7. Have any structural alterations been carried out on the property within the last 4 years? If so, please supply a copy of the necessary planning permission and/or building regulation consent.

YES/NO