



Think Mortgages Ltd

Client Factfind

	Applicant 1	Applicant 2
Customer Name		
Date of Birth		
Telephone No.		
Email Address		
New Mortgage Requirements		
Residential/BTL		
Mortgage Type		
Government Schemes		
Property value/Purchase Price		
Loan Required		
Total Deposit		
Source of Deposit		
Repayment Type		
Preferred Term		
Fees - Internal Use Only		
Customer Type		
Upfront Assessment Fee		
Fee Upon Receipt of Mortgage Offer		
Credit Commitments		
Life/Protection Insurance		
Property to be Mortgaged		
Full Address:		
Type		
Number of Bedrooms		
Year Built		
Number of Storeys in Building		
Parking/Garage		
Number of Kitchens		
Number of Bathrooms		
Flat only - Which Floor		
Flat only - Years Remaining on Lease		
Shared Ownership Rent		
BTL Expected/received rent		
Property Notes:		
Estate Agents		
Company Name		
Address		
Point of Contact		
Contact Number/ Email Address		
Solicitors		
Company Name		
Address		
Point of Contact		
Contact Number/ Email Address		
Direct Debit for New Mortgage Payment		
Account Holder Name		
Name of Bank		
Account Number		
Sort Code		
Preferred Day of Direct Debit – if left blank we will select the 1st of each month		

	Applicant 1	Applicant 2
Title		
First Name		
Middle Name		
Surname		
Gender		
Marital Status		
Relationship to other applicant		
Maiden Name		
Date of name change		
Nationality		
Residence Status		
Date moved to UK		
National Insurance no.		
Dependents Full names and DOB		
Child maintenance - If so, how much?		
3 Year Address History		
Date Moved in		
Current Address – Number & Street		
Town		
Postcode		
Status – Own/ Rent		
If rented – Monthly Rent		
If Rented – Provide Landlords Name, Address, Telephone and Email		
Previous Address		
Date Moved in		
Current Address – Number & Street		
Town		
Postcode		
Status – Own/ Rent		
If rented – Monthly Rent		
If Rented – Provide Landlords Name, Address, Telephone and Email		
12 Months Employment History		
Job Title		
Current Employer		
Start Date		
(if less than 1yr, please provide previous employer in notes section)		
Status – Full Time/ Part time		
Contract – FT/ Perm/ Contract		
Employer Address		
Office No/ Building Name		
Street		
City		
Postcode		
Employer Telephone Number		
Employer Email Address		
Anticipated Retirement Age		
Employed Income		
Basic annual salary		
Guaranteed bonus/frequency		
Discretionary bonus/frequency		
Commission/frequency		
Overtime/frequency		
Car allowance		
Self Employed		
Director/Partnership/Sole trader?		
Total share holding		
Name of business		
How long trading?		
No of years accounts/SA302		
Latest 3 Years Pre-Tax Net Profit	Y/End: £	Y/End: £
	Y/End: £	Y/End: £
	Y/End: £	Y/End: £
Accountant - Please include Name, Address, Tel no, Email & Firm in box below		

Other Income				
Pension (state/private)				
Tax Credits				
State benefits				
Second job				
Rental income - please provide details of all BTL's on page 4				
Any other income?				
Current Mortgage				
Name of Current Lender				
Account Number				
Residential or BTL				
Sole/joint – Who with				
Outstanding Balance				
Monthly Repayment				
Repayment or Interest Only				
Term Remaining				
Fixed/ Variable/ Tracker rate				
Current interest rate %				
Date current rate ends				
If selling, sale price?				
Additional properties/mortgages – please provide details of all BTL's in notes section				
Notes				
<p><u>Please provide any additional information :</u></p> <p>Notes:</p> <p>Landlord Details:</p> <ul style="list-style-type: none"> • Relates to: • Full Name • Address: • Telephone No: • Email Address: <p>Previous Employer Details:</p> <ul style="list-style-type: none"> • Relates to: • Start Date: • End Date: • Name of Employer: • Address of Employer: • Job Title: <p><u>Additional Properties Owned – please provide for all properties, if more than two we will provide a portfolio sheet:</u></p> <table border="0"> <tr> <td> <ul style="list-style-type: none"> • Full Property Address: • Type of Property: • If flat – years on lease: • Approx Value: • Date of Purchase: • Mortgaged/Unencumbered: • Mortgage Lender: • Account No: • Interest Only/Repayment: • Product: • Fixed Rate Expiry: • Remaining Term: • Rental Received: </td> <td> <ul style="list-style-type: none"> • Full Property Address: • Type of Property: • If flat – years on lease: • Approx Value: • Date of Purchase: • Mortgaged/Unencumbered: • Mortgage Lender: • Account No: • Interest Only/Repayment: • Product: • Fixed Rate Expiry: • Remaining Term: • Rental Received: </td> </tr> </table>			<ul style="list-style-type: none"> • Full Property Address: • Type of Property: • If flat – years on lease: • Approx Value: • Date of Purchase: • Mortgaged/Unencumbered: • Mortgage Lender: • Account No: • Interest Only/Repayment: • Product: • Fixed Rate Expiry: • Remaining Term: • Rental Received: 	<ul style="list-style-type: none"> • Full Property Address: • Type of Property: • If flat – years on lease: • Approx Value: • Date of Purchase: • Mortgaged/Unencumbered: • Mortgage Lender: • Account No: • Interest Only/Repayment: • Product: • Fixed Rate Expiry: • Remaining Term: • Rental Received:
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